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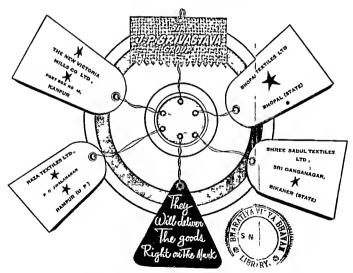


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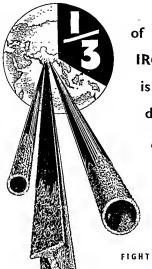
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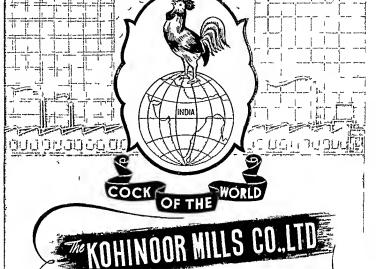
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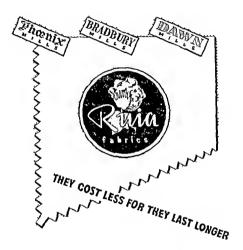
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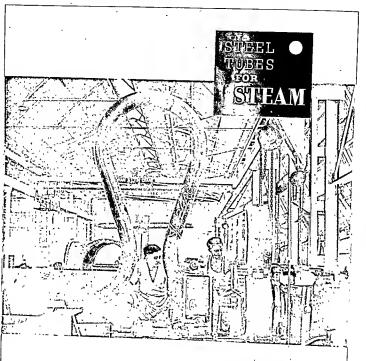
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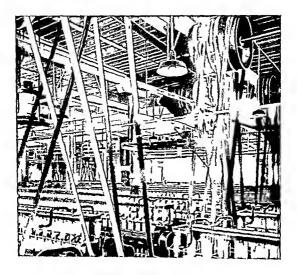
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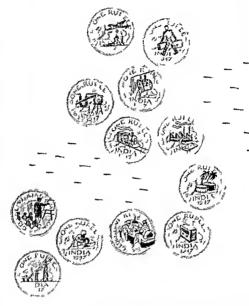
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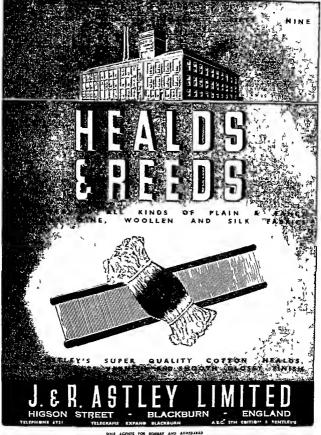
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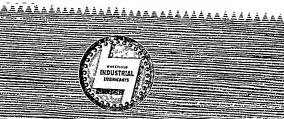
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Total policy in force at the 31,26 34,41
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Total premium earning for 1,41 1.59
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Total expenses of operation 41 48
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New business written in the 6,72 6.87
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of the year
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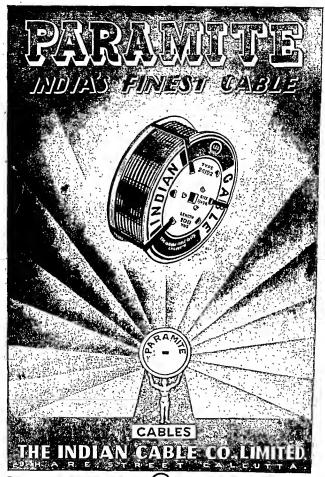
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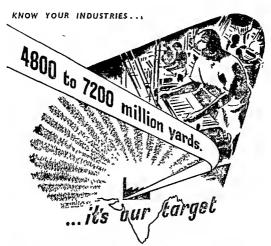


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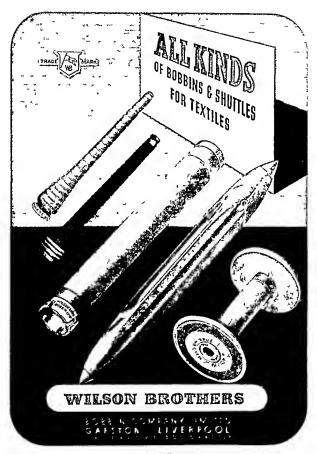
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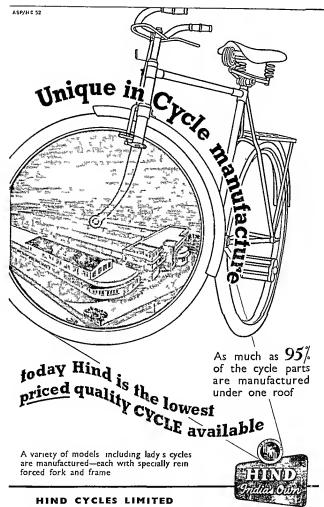
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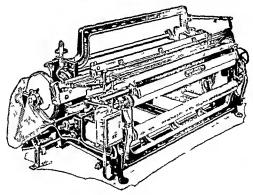
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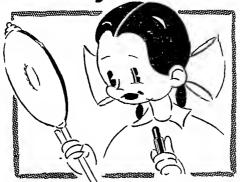


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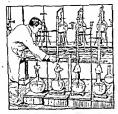


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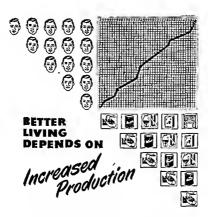
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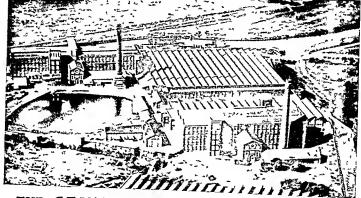
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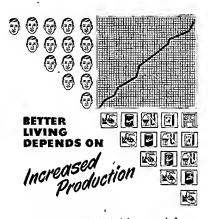
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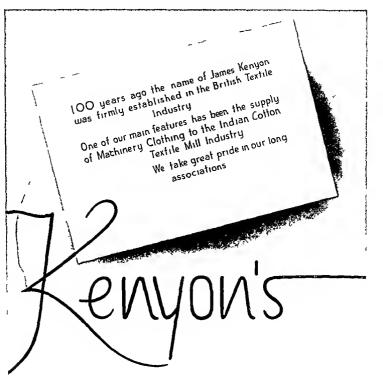
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Editorial Introduction ...

T 0 its yearly publication which, for nearly a decade and a half, has been a chronicle of the vicissitudes of the Indian Cotton Textile Industry, the Indian Cotton Textile Industry Annual adds, this year, a special Centenary Volume to celebrate the first Centenary of India's cotton mill industry Few people in this country have perhaps cared to remember that, with the turn of this half century, the Indian Cotton Textile Industry, as a factory industry, completes the first century of its existence. It is an index of its importance and an additional reason for jubilation, that the first Centenary of the greatest national industry falls due for celebration in the very same year in which, after achieving independent status at considerable sacrifice, India has become a Sovereign Democratic Republic

In the older form of a Cottage Industry, our cotton textiles, which won world-wide admiration, date from time immemorial and it has been established beyond controversy that India is the birthplace of Cotton, as indeed also of cotton textiles 1 and Sugar and Sugarcane 2 Although technically, the first Cotton Textile Mill on modern lines was established in 1818 in Bengal, it was in Bombay that the real foundation of the mill industry was laid. It was in the year of grace 1851 that the plans of the first mill were conceived, machinery ordered from Great Britain, and construction work undertaken at Bombay Progress was extremely slow indeed upto the outbreak of the first World War of 1914-18 It is a matter of common knowledge that conditions were often such as to make the industry almost despair of its survival Indeed, the story of the Indian

Cotton Textile Industry during the last 100 years is in many ways identical with the story of the nation's struggle for political independence. The same forces which threatened the latter also threatened the former The decline of Indian handloom weaving by the middle of the nineteenth century almost spelt the doom of Indian freedom The courage that was needed to start a Cotton Mill in India in the days when all the might of the ruling power was set against the development of the cotton mill industry in this country was not less than the courage needed to maugurate the Swaras or the Home Rule Movement Today. India ranks as the third largest producer of cotton goods in the world, and the thoughts of her people must turn in profound gratitude to those pioneers who set out with undaunted courage and firm determination on this seemingly hopeless venture in the face of the many handicaps that must have stared them in the face

To the growth of the Indian Cotton Textile Industry, all sections of the people have contributed in an equally meritorious measure. While the earlier millowners evinced a strange mixture of business acumen and broad patriotism, their successors had to contend with endless obstacles till the increased political power of the Indian people and changes in the wider sphere of world economy and international trade gave them a more secure position. But there is no doubt that the Indian industry would have come to an early end, if the leaders of the people had not made the cause of the Cotton Textile Industry a national cause and if the people had not responded to the call to rally to its support in periods of crisis

If Swadeshi and Swaraj were the twin ideals of the people. Indian cloth, too was for decades a synonym of Swadesh. The might of Mahatma Gandhi, the Father of the Indian Nation, was behind the move-

¹Vide M P Gandhis Indian Cotton Textile Industry — with a foreword by Sir Purshotamdas Thakurdas 1309 and "How to Mahitima Gandha 1331 — (Guerati edition) with a foreased by "Wide Problems of Sugar Industry in India" by M P Gandha 1931 — 1945 pp 400

ment for the boycott of foreign imported cloth Picketting was done with all the selfless zeal that the Congressman of the thirties was capable of And the Indian industry forged ahead in the confidence that its future was bound up with the future of a great nation which was being awakened by selfless men to its great destury

The Indian Cotton Textile Industry is thus the product of historic forces the prize of the nation's trumph in the fight for freedom. Its future is un doubtedly as bright as its past is insuring. With the attainment of freedom however the sentimental approach of the old days becomes mappropriate Not only have the people a right to expect the best in quality and prices from the industry by which they have stood through thick and thin but the industry too has to rise to its new responsibilities and opportunities. The dissatisfaction felt by the average man with cloth supply in the last few years is a measure of the manner and extent to which the industry can fall short of public expectations. And what is even more important the time is gone when the satisfaction of home demand can be deemed to be an adequate achievement for the Indian Cotton Textile Industry In the few years following the second World War Indian cotton goods have flowed into neighbouring foreign markets The advantages which have throughout history made India the natural home of the Cotton Textile Industry, should enable us also to become a great exporter of cotton goods to overseas markets

The rapidity with which new techniques are being established in the textile industry abroad and the relative backwardness of this country in this respect raises problems which the industry cannot solve except with the greatest effort. The time has come when such efforts should be put forward in unstinted measure so that the Indian Cotton Textle Industry can repay the debt it owes to the nation and the

people by achieving efficiency of the highest order and by suitable expansion which would ensure supplies of increased quantities of cloth of superior quality at raisonable prices in the years to come. This will also help the country to raise its standard of living and to contribute to the increased prosperity of our teering millions.

ACKNOW LEDGMENT

We take this opportunity of thanking all the friends for their authoritative contributions and the various advertisers for the extension of their cooperation which has enabled us to present this volume in celebration of the first Centenary of this national industry, in its present form

We are also deeply indebted to Dr Rajendra Prasad President of the Republic of India Governors of States Ministers of the Union Government and other eminent personages in the public life of the country who have kindly sent us inspiring messages on the occasion of the publication of this Centenary Volume.

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Next year we plan to bring out a similar volume dealing with the vicessitudes of the 'Major Industries during the first year of the Republic of India' We request all our esteemed contributors advertisers and advertising agencies to extend to us again their full eo operation in our forthcoming enterprise

We will feel grateful to readers of this volume if they will kindly let us have their impressions of it. We will also welcome suggestions from them in respect of the fortheoming volume on the Major Industries in the Republic of India which we intend to publish early in 1951.

(M P GANDHI)

Edutor

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There Independence Anniversary
15th August 1950

Page Two

Message from the President of Judia



GOVERNMENT HOUSE, NEW DELIN

Dear Shri Gandhi,

I am very pleased to learn that you are going to bring out a "Cotton Textile Industry Centenary Volume" to commemorate the first hundred years of the Textile Industry in India.

I have had occasions to see your publications in connection with Cotton Textile Industry and have to congratulate you not only on their fine get-up, but also on the very useful material contained in these publications. I have no doubt that this Centenary Volume will maintain the highest etandard and will be worthy of being a commemoration volume on the subject of Textile Industry of India. It appears you have escured the support of a galaxy of writers who can epeak with **Nnowledge and authority on the subjects taken up by them, and their contributions are sure to make the Volume a useful one for everyone interested in the subject

I wish you all success.

Yours sincerely,

Reyentrations

Sriyut M. P. Gandhi, C/o Gandhi & Co., Jan Mansion, Sir Pherozshah Mehta Road, Fort, Bombay 1.



GOVERNMENT HOUSE, BOMBAY 6

I congratulate the Editor of the Indian Cotton Textle Industry Annual on his enterprise in producing a special volume of the Annual to celebrate the centenary of the cotton textile industry in India. A hundred pears in a long time, and the industry can fook back with pride on its achievements during those many years. But it is much more important to fook ahead, and whole vishing the cotton textile industry many years of prosperity, I hope that all those concerned will put forward their best efforts in the interests of the industry as a whole

Messac from Ha Lacilet a 110 COMENOR DE BOMBA

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GOVERNOR'S CAMP, UTTAR PRADESI

Dear Mr Gandhi,

Message f im

II i Ex elle is

THE COVERNOR OF \$1.11

I am glad to hear you are bringing out an illustrated volume on art paper t etelerate the first tentenary of the Indian Cotton Mill Industry I have no doubling from your previous efforts the publication will be very interesting an instructive.

The Cotton Texule Industry has been the first and greatest of large scal undertakings in India and its hundred years of existence are worthy o commemoration

I wish you every success in your enterprise

Yours sincerely,

to prote

GOVERNMENT HOUSE, CALCUTTA

My esteemed friend Sri M P Gandhi, is a man of versatile talents and his contribution to the development of Indian industry has been great. His Annuals on cotton, sugar and other industries have definitely been of the greatest use to all concerned and have proved a store house of correct information. He now proposes to bring out a Centenary Volume to commemorate the completion of hundred years of the great textile industry. It is a worthy enterprise to commemorate a notable event. The textile industry is our premier Indian industry and for the first time it indicated to the world at large the capacity and the genius of the Indian business people to build up a great industral India.

I have no doubt that this Commemoration Volume will be widely welcomed I wish it all success Message from

H's Excellence

THE GOVERNOR OF BENCAL

KAILAS NATH KATJU

GOVERNMENT HOUSE OOTACANUND

I am very glad to learn that the Editor of the "Indian Cotton Textile Industry" is bringing out a special volume to celebrate the Centenary of the Cotton Textile Industry in India I would like to congratulate Sri M. P. Gandhi on his enterprise and initiative in compiling this Volume, which, I understand will contain contributions from eminent modistrailists and distinguished men

Madras has played an important role, particularly in the last quarter of a century, in developing the spinning and weaving industry in Indus. The Indian Cotton Textile Industry is one of the most important and well organised industries in India, and any literature to illustrate the origin and development of the industry is most welcome.

I would like to send my best wishes for the success of the Volume and express the hope that it will be useful both from the point of view of the industrialists and of the public

KRISHNA KUMARSINHJI BHAVSINHJI

Messare from

H s Ex elle y

FHE GOVERNOR OF MADRAS

GOVERNMENT HOUSE. RANCHI

The Indian Cotton Mill Industry is the premier industry of India It has gone through vicissitudes of fortunes during the last hundred years which it is important for present and future Indian industrialists and administrators to know All future industrial progress will depend upon the experience the country has gained in the past in running big industries. An authoritative and authentic account of the Indian Mill Industry in the last hundred years is therefore very necessary for those who are interested in India's industrial development. I am therefore parti cularly gratified to learn that Prof M P Gandhi has decided to bring out a special publication to celebrate the first Centenary of the Indian Cotton Mill Industry Prof Gandhi's Cotton Textile Industry Annuals have been found to be very useful -nay almost indispensable to those who have to deal or discuss problems relating to the Cotton Industry He is therefore best qualified to bring out the special number which is intended to chronicle the history of this industry of last one

I wish it complete success

Message fr ni Il s Excellency THE COVERNOR OF BIHAR

M S ANEY

GOVERNMENT HOUSE. PACHMARHI

Message fron H s Excellency THE GOVERNOR OF MADRICA PRADESH

Shrs M P Gandhi is publishing a special volume to celebrate the first 100 years of the Indian Cotton Textile Industry I had gone through his previous publications-the Indian Sugar Industry Annual and the Indian Handloom Industry Annual I have known Shin Gandhi for a number of years. His publications contain the most accurate and detailed information. He makes the subject which he deals with very interesting. The information given is full and useful. The cotton textile industry is one of the most important and well established industries in India Indians have shown if one may say so, a special talent for this type of industry It has its own difficulties today and is passing through critical times It has great scope for expansion The publication of such a volume at such a time is bound to be useful and helpful. I feel confident that this commemoration volume would be highly useful and helpful, and would be welcomed by all

MANGALDAS PAKVASA

GOVERNMENT HOUSE, PURI

I have had the benefit of reading Shri M P Gandlu's publications for many years, and have always found them helpful and mteresting I shall look forward to the Centenary Volume which is expected to be out soon.

Message from II's Excellency THE COVERNOR OF ORISSA

ASAF ALI

NEW DELHI

MINISTER FOR FINANCE

The celebration of the first Centenary of the Indian Cotton Mill Industry as a fitting occasion for taking stock of its growth in the past and forecasting its development in the futtire, especially as the end of the period marks approximately the end of an era and the beginning of another in the life of the nistion. I have no doubt that the Centenary Volume which you intend to bring out will do justice to the occasion and marshal facts, figures and trends with the thoroughness and insight which readers of your annual surveys have learned to expect.

Message from
The Hon surable
SHRI CHIN FAMAN D DESING KII
Finance Minister
Government of India

C. D DESHMUKH

NEW DELHI.

MINISTER FOR INDUSTRY & SUPPLY

In order to know anything authoritatively about the cotton textile industry, usually I refer to Mr M P Gandhi's writings. Mr Gandhi now proposes to bring out a special publication this year to celebrate the first Centenary of the Indian Cotton Mill Industry. I have no doubt the will give a full picture of the condition of the industry is from all aspects. The problems which this industry is facing today are no doubt the problems of Government and of the country also. Solution of these problems requires thorough knowledge of them and the correct approach on the part of all concerned with the industry. At this juncture, Mr Gandhi's subfication will be of considerable help to every body.

H K MAHATAB

NEW DELHI

MINISTER FOR FOOD & AGRICULTURE

Message from

The Honourable

SHRE HE & MAJIATAR

Minister for Industry & Supply

Government of India

Dear Shri Gandhi,

I am glad to learn that you are going to bring out shortly a special publication to celebrate the first Centenary of the Indian Cotton Mill Industry. The importance of the Indian Cotton Textile Industry to India's economy needs no emphasis, and its hundred years of existence are certainly worthy of commemoration

I wish you every success in your enterprise and hope that the Volume will prove to be a useful one both to the Industry and the public as a whole

Yours sincerely, K. M. MUNSHI. Message from
The Honomable
Sing & M. MUNSHI
Minister for Losset & Agreetings
Government of Ind a

NEW DELHI

MINISTER FOR COMMERCE

I am glad indeed to learn that Prof. M. P. Gandhi is binging out a Comme moration Volume to celebrate the first Gentenary of the Indian Cotton Mil Industry. It is but right that this our premier industry which has had to wage such a tendestingle in order to come to its own and which has successfully weathered all storms should fittingly celebrate the completion of one hundred years of its useful life. We have every reason to be grateful to Peol. Gandhi for his happy thought and our best whiles are with him for the success of his venume.

This industry L an emblem of the potential ties of our national resources and our latent skill, energy and enterprise. In the setting of today, it should serve as an exbortation to others to take up varied fields of endeavour in order to enrich our national life in every possible way.

I have every confidence that opportunity will be taken at the present moment to tell us all that we need know in the matter of industry in general, not only on the side of organisational success, but also on the side of sympathy and under standing of fellow human beings: that alone can help in the true organisation of men in a real bettherhood wherein all are happy in their own work and no on interferes with any other person's work, where all are proud of their own tasks and astusfied in fulfilling them well, where suspicions butternesses and jealouses do not mat the even flow of life where each appreciates the difficulties and limit tan ons of another, where in short all are jounced together in treading the self same goal pash for the attainment of the self same goal.

SRI PRAKASA

Message fro 1
The Honourable
Suri SRI PRAKASA
M for the Connecee
Coon and the day

NEW DELHI

MINISTER FOR LABOUR

Dear Shn Gandhi

It was with great pleasure that I read of your venture to bring out a special issue of the "Indian Cotton Textile Industry", embodying an account of the achievements of this premier undustry of India, during the last 100 years viz 1851 to 1950. I had occasions to go through some of your publications on Cotton and Sugar and 5 was highly impressed by your int mark knowledge of these industries. I am confident that coming from you this Centeriary Volume will be welcomed by the people interested in the subject and they would also profit by your labour I wish you all success in your noble mission.

Yours sincerely, JAGJIVAN RAM

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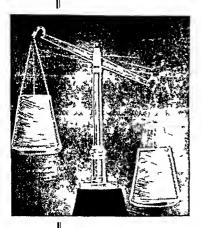
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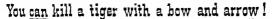
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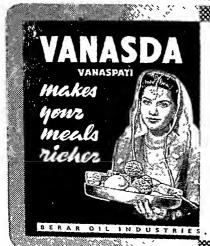
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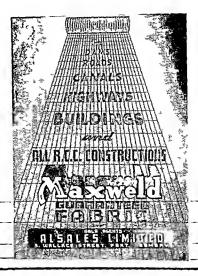
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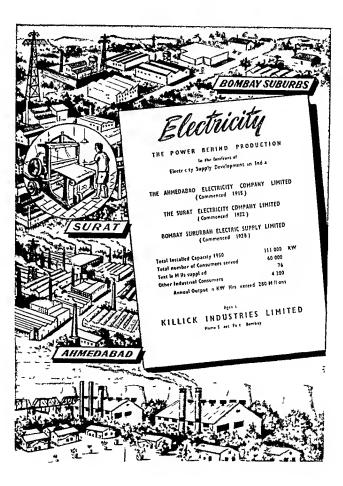
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The Story of

The Cotton Textile Industry in India

By C H BHABHA, former Commerce Member, Government of India

In the economic life of India, the textile industry occupies a light place of pride not only because of its being the foremost indigenous industry of the country, but because of its great contribution, now for just a century, to the wealth and prospently of the Nation. With a very modest beginning in 1818, this industry has so developed and expanded that it has now assumed a position of international importance. From the point of view of capital sunk in it, the addition it has mide to the wealth and income of the country and the volume of labour employed by it, this industry has become the largest organised industry in India. In addition, it has brought in its wake other important trades and has been responsible for transforming the fishing village of Bombay into Urbs Prima India.

1851-Foundation of the Industry

The year 1818 saw the establishment of the first so-called cotton mill under the name of Bowreah Cotton Mills near Calcutta, started by English enterprise However, the first Indian textile industrialist was Mr C N Davar, a Parsee merchant with great enterprise, vision and foresight. This idea caught his imagination when he saw the East India Company exporting large quantities of cotton in the year 1850 A year later, Mr Davar, after negotiating a deal with Messrs Platt Bros of Oldham, England, for supply of machinery, selected Bombay for his proposed factory and his dreams were realised when on February 22, 1854, Mr Davar s mill, styled as The Bombay Spinning Mill, actually started functioning at Tardeo with 20,000 spindles successful venture was followed up by other enterprising Bombay became the envy of merchants from Broach and Ahmedabad and soon in 1859 a textile mill was started under the management of Mr Ranchhodlal Chhotalal at Ahmedabad This fever of enthusiasm spread fast and wide with the result, that, on an average, about 4 mills per year were erected during the last century or so

It may be of great interest to make a special mention of the fact that the first pioneers of Indian textle industry had not received any technical or academic education and yet achieved success in their new enterprise. They proved not only successful but utilised their success in fruitful elananels and founded many public institutions from the profits earn ed, which institutions today are a monument to the philan thropic and adventurous spirit of these pioneers

The products of these factories today cover a wide range and some of the mills are capable of producing a variety of grey, bleached, woven, coloured or printed fabries to suit both domestic and foreign requirements and these stand in favourable comparison in quality with the best imported materials from England

1860-90

The industry has passed through many vicisitudes periods of prosperity alternating with adversity The period from 1856 to 1860 was quite a good and prosperous quinquenium. In 1861 the outbreak of the American Civil War gave a further fillip to the industry but with its cessa tion followed a slump. The revival hereafter was slow, for with the demise of the enterprising poinciers who were men of integrity and vision management of various successful units passed into unworthly hands of the heirs of these stal warts. Nepotism, neglect, incompetence, misapplication of funds, misconduct and other evils which recurred at a subsequent period, too, characterised those new managements. This led to a deterioration in the affairs of textile concerns, and this tendency was accentuated during the great plague and famine of 1898.

The Turn of the Century

In the closing years of the last century, the City of Bombay was the most prominent textile mills centre and continued as such for a few more years. In its eighty odd mills were installed about 25 lakhs spindles and 25,000 looms. These figures constituted 50% of the total spinning and weaving capacity of the other 125 mills located in various parts of India. Today Bombay has 65 mills accounting for 28 lakhs spindles with a considerable increase in the number of looms to 65 000. The all India figures, including Bombay City are 422 mills, 104 lakhs spindles and 202 000 looms.

Fifty or sixty years ago Bombay mills used to produce 7 to 8 lakhs bales of yarn for the China market because the competition from the very small number of mills in the Far Last was negligible. This business was fairly profitable

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Fifty or sixty years ago Bombay mills used to produce 7 to 8 lakhs bales of yarn for the China market because the competition from the very small number of mills in the Far East was negligible. This business was fairly profitable. owing to various factors. One of them was the extremely low constructional and equipment cost of new milb. Inclusive of land, buildings machinery, and motive power the per spindle cost was between Rs. 30 and Rs. 40 on an average of 75 scount. As ring spindles were being installed in place of mules, the cost became a little higher. Working expenses were also very low and were no more than nine or ten pies for 10s and one and a quarter arian for 20s per lb of 3 arm. Cotton prices were also utility of the production of coarse yarms. The range of prices for the production of coarse yarms. The range of prices for 10s and 20s yarms was between four to six annuas a pound and the selling price of grey long cloth did not exceed 7 to 8 annuas a pound.

1900 1914

The great famine of 1900 which overtook Western India caused an enormous scarcity of cotton and many of the Bombay and Ahmedabad milts had to close down for longeriods. In the first four years of the new century the industry struck a bad patch, some of the weakly financed concerns came under the hammer and were said lock, stock and barrel for anywhere between Rs. 2 to Rs. 5 likhs. A repetition of this depression was again winnessed in the thirties when again a good many well known milts changed hands at ridiculously low figures or were scrapped at cast iron value.

World War I

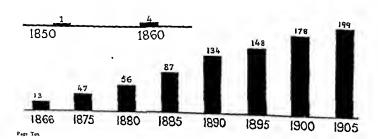
With the beginning of World War I in 1914 the primary reactions in this country were of a panicky nature and the textile industry was accordingly affected. Irrespective of the supply and demand position, prices of cotton, yirn and cloth slumped to record low levels Bankers became extremely diffident and even loans advanced by them on a safe and secure basis were called in With great difficulty the indus try survived this first shock Then came the turning point Shipments of cloth from foreign countries began to diminish owing to the switch over of the transport system to war purposes Thus the growing scarcity of manufactured goods brought about a substantial rise in prices and boom conditions were reached. Ordinary long cloth which was sold as low as 6 annas to 7 annas a pound, reached the top figure of Rs 3 per pound and coarse yarns from 4 annas to over a rupce. Cotton prices assumed a firmer tone as foreign mills were on intensive war work for supplying materials to the Defence Forces India's contribution in this direction was also considerable. Between 1918 and 1921 the Indian mills made record profits. On the stock exchange, scripts of mills companies and of other industrials were quoted six and seven times over the par value, while only five years before the shares of many companies were unsaleable even at a discount

1922-37

The ebb of the tude started from 1q2° and for the next fifteen years the industry was in the doldrums. Ulthough in the env of Bombay no new mills had been put up since 1915 or 1916 the effects of depression were felt more in this quirter than in other parts of India. No less than a third of the Bombay mills either changed hands or were exapped. During the War some of the millowers had sold their concerns at as high a price as Rs 50 to Rs 60 lakins.

7857-

GROWTH IN NUMBER OF MILLS



These could again be had at a tenth of the price. Bombay labour had to go without work for a considerable length of time and prolonged strikes were the facture of those days Shareholders had to go without dividends from a majority of mills and share values slumped heavily. Manageng Agents not only did not earn their commissions but had to pay up losses to banks is guarantors. Bombay fielt the full blast of the world wide depression which started from the U.S. in 1930. But during this period the industry made rapid strides in upcountry centres and especially in Indian States where it could operate at a greater advantage owing to cheap labour and provinity of cotton fields and of consuming markets for manufactured goods.

World War II

The great depression of 1930 31 was gradually coming to an end and by 1936 the industry began to show good results till the second World War intervened at the end of 1939 Unlike the commencement of the first World War which had a depressing effect all industries were operating under the influence of a certain amount of optimism engendered by the memory of the boom conditions of the last war Yarn and cloth prices rose considerably and quotations of shares on stock exchanges were heavily marked up As disaster after disaster overtook the Allies through the success ful onslaught of Germany and Japan in the early stages a note of despondence was visible in almost all business and industries in this country Considerable setback occurred in the price levels and it was not until the end of 1942 that conditions began to improve Since 1943 profits of cotton mills soared to record heights and the exorbitant prices fetched by yarns and cloth put a great strain upon the purchasing power of the public. The quantity of cloth axial able to them had to be considerably curtailed owing to the Government demands for war purposes. It is estimated that the industry supplied to the Government no less than 3 600 million yards in the war years.

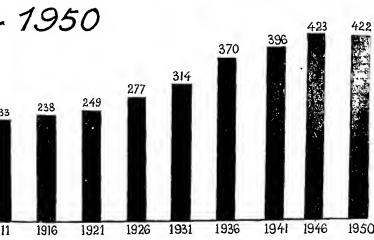
Post-War Years

This state of affairs created new factors Night work had to be introduced in almost all the mills in India for the purpose of speeding up production. Prices of manu factured goods had sky rocketted and profiteering was ram pant. Owing to war exigencies this supply of cloth to the crul population had to be rationed. Control over product on distribution and prices had to be introduced by Govern ment stepping in. This task was entitied to a newly retained Government department under the Textile Commissioner assisted by various committees of non-official experts. Now that conditions are becoming more normal owing to the disappearance of the seller's market in textile goods and cessation of war demands it is to be lioped that controls will be minimised as far as possible.

Having had a quick historical survey of the industry, it would be of interest to consider other problems which have vital correlation with this premier industry of the country

Lancashire and Judia

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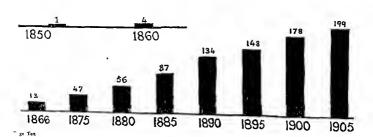
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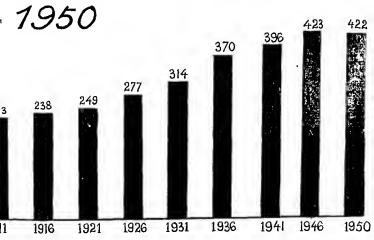
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of their fabrics were a by word in this country But Indian mills have progressively taken their place by the weaving of finer cloth to a very great extent and are now importing foreign cotton totalling seven to eight lakhs of bales annually for their production Lancashire was always an expensive producer and the imposition of import duty plus freight charges have made the Indian market unprofitable for her A considerable amount of ill will had been created in this country owing to the British Government forcing upon Indian mills an excise duty of 31/2% on all cloth made by Economically speaking the duties were hardly injurious But its political repercussions were extremely grave They were looked upon as a badge of India's servi-lity to a conquering Power The boycott of Lancashire goods and their bonfires became a regular feature not till long after the end of the first World War that this duty was abolished. In the meantime irreparable harm was done to the good relations between Britain and India

Laneahure did try to make some amends hier on white Indo-Laneahure Pact (also known as Mody Lees Pact) pledged Laneashire to act as India s attorney in those Colo nual and Dominion markets in which India had established connections, and even went so far as to agree to obtaining a quota in any Empire market for the Indian mills in the event of the latter hiving no quota of their own. It is true that in return for this India allowed a small set off in the prevailing cloth and yara duties on imported British goe of The march of events leading to the second World War made this pact practically a dead letter

Japan and India

The rise of the industrial power of Japan proved at one time a grave challenge to the textile industry of this country Her textile industry during the eighties of the list century was in its infancy and it may be of interest to learn that several Japanese apprentices were allowed by the late Mr J N Tala at his Swadeshi Mills in Coorla With the attainment of an unusual amount of efficiency through large combines, cheap and ranonalised libour, special concessions for transport of Japanese goods in Japanese be toms and a ruthless dumping policy in her export market, Japan became the terror of the textile manufacturers of the world were raised against her, and quotas were rigidly fixed Fortunately for the industry the disaster which overtook Japan in the second World War has for the present clipped her competitive power—She is no longer the mistress of a large number of textile mills which she ran in China Many of her own concerns in her home land have been blitzed However, the Japanese textile industry is being put on her feet again under American tutelage and it remains to be scen how far she will be allowed to compete within the markets of the world Already the world's manufacturers are entering a caveat against indiscriminate production of the Japanese mills It may be mentioned here that Japan gate crashed into the Indian markets in the thirties to such an extent that the Government had to ration the annual imports to the maximum of 400 million yards a year

In one respect Japan was very foresighted. She beheved in the efficiency of her ocean transport system so that she could capture the markets of the world through Government subsidized freights for cotton and manufactured goods. Along with her textile industry there give her shipping industry Even 50 or 60 years ago she possessed an ex cellent fleet of steamers which were operated by the N 1 K In those days only Jamshetti Tata could forsee the terrific handicap to Indian industries in the absence of her own shipping line He saw how the P & O, the Brush Imha and other Continental lines were fattening on Indian trade The freight item on yarns to China, even in those days of cheap prices of Rs 100 to Re 150 per bale, was not less than Rs 14 to Rs 19 per cubic ton When Mr Tata started negotiating with the Japanese lines for Indian participation in their ships, an ugly freight war rewed its The threat of its reduction to Re I per ton by the European lines broke the back of Tata's enterprise in which he was willing to sink a large sum himself. His agreement with the NYK came to naught. His idea of starting a new Tata line with two steamers which he haif already bought in England was knocked on the head and the foreign lines were able to restore the old excessive freight charges Without Indian shipping, a great handicap has been imposed upon the exports and imports of piecegoods, cotton and other commodities, and it has not been possible to earn foreign exchange for helping the country's economy

Labon

A word about the labour in this industry seems quite vital Long years of exploitation, unsatisfactory housing conditions and the prevalence of illiteracy have embittered its relations with the employer Unfortunately no economic guidance has been given to the workers by the heads of the various Labour Unions Leadership is lacking in technical know ledge and practical expenence of working in mills with the result that constructive suggestions have never been put forward and the workers more than the employers have suffered Communism and nationalisation of industries with the workers as the bosses are the prevailing slogans Rationalisation by which each labourer could earn more through minding more machines has been stoutly resisted by the umon leaders and even a policy of go slow", "work less" and earn more has been tehemently advocated Take the case of Japan Over 25 years 1go this country had 250 mills installed with 72 lakhs spindles and 133,500 looms, employing 230,000 workers At the beginning of the second World War the number of mills had increased to nearly 380, the number of spindles to nearly one crore, and looms to two lakhs But the number of workers had gone down from 230,000 to 190,000 Today the number of mills in India and Pakistan is 420, spindles 10,400,000, looms 202,000 and the average number of employees on a day shift basis alone is close upon 5 lakhs By the reduc tion of our labour force we shall be in a position to raise individual wages and at the same time effect a saving in working costs We can also give better amenities to labour and extend our welfare programme in each mill with its re duced number of workers Every new mill should rigidly adhere to rationalisation of labour because it will be in the fortunate position of not discharging workers but of recruiting them

The practice of computing the percentage of labour costs on the total value of manufactured goods is a fairly good yard stack for comparison. But a fallarous conclusion can be easily drawn. In a purely spinning mill which produces yarns for sale, the ratio of wages to the value of output is

Renaissance of

The Indian Cotton Textile Industry

By Dr. S. S. BHATNAGAR, F.R S., Director of Scientific & Industrial Research and

Dr. S. D. MAHANT, Ph D., F.R.I C, Industrial Economist

NDOUBTEDLY the Indian textile industry is one of the national ventures which has come to occupy a -place of pride and importance in our economy This is a development for which we should be beholden to those pioneers who foresaw the possibilities a century ago and gave us the necessary good start. Their foresight has enabled us to regain, at least partly, the position which India had been occupying in the textile world before the advent of the British. The story of the slow languish and practical extinction of the textile industry in the early days of the East India Company is well known and need not be re capitulated here It is a matter of considerable satisfaction that India is again emerging as an important factor in the textile world and the centenary of the renaissance of the textile industry is happily coincident with the establishment of an export market for Indian textiles This is a happy position but considerable effort is needed to consolidate the gains and secure fresh fields. For this purpose it will be necessary to consider steps so that Indian textiles are able to maintain their excellence and set standards for other countries to follow

Three Urgent Factors

Indigenous supplies of long staple cotton, an indigenous dye stuffs industry and broadening of outlook to adoption of new techniques are three essential factors which demand the urgent attention of textile industry to ensure for it a healthy growth. All the three are of equally ingent importance and it is not possible to give any priority to one over the other.

Long-Staple Cotton

The textule industry is fully aware of the results of our efforts in the pist to croke new varieties of cotton having a longer steple. The successful evolution of what have come to be known as American, 259F, narma and other similar varieties is well known. These improvements in Indiun cotton which accrued as a result of long research were of considerable susstance in the stabilisation of the Indian textile industry and although a myor portion of the artes where they were successfully cultivated has passed to

Pakistan, it should be possible with some effort to colve new strains with the necessary length of fibre so that India is able to meet a substantial portion of the needs of her industry. This is a long term development the economic importance of which cannot be over-emphasized. Considerable thought will be required in co-ordinating and dove tailing the production of each crops like cotton and jute with food crops to ensure an all round self sufficiency. It is a matter of some satisfaction to know that importance of this subject is being appresented all round and it is to be hoped that with time a satisfactory solution of the problem will be found.

Dye-stuffs Industry

The establishment of an indigenous die stuffs industry is another matter requiring the attention of the textile indus try Our annual imports of dye stuffs of different kinds are of the order of 12 crores of rupees and the textile industry is the largest single consumer, in fact the only consumer worth the name. India has ample resources of coal of which considerable quantities are converted into coke for the steel industry and coal tar from which some of the basic raw material for the dye stuff industry are derived, is obtain ed as a bye product With the projected expansion of the steel industry, still larger quantities of coal far will become available and it is to the national interest that these valuable products should be utilised to the best advantage. Some years ago, a Tata ICI combine was expected to take up this important venture but for some reason or other the scheme has not materialised. The textile industry has abundant financial resources at its command which should be pooled together to set up a dye-stuffs industry in India Being in a position to command all the technical assistance required, a development of this nature is in the interest of the textile industry itself It is for the leaders of the indus try to devote time and thought to this matter and ensure speedy steps in the right direction so that in times of emergency, the industry can rely on obtaining its require ments from indigenous sources Active planning and development of the dye stuffs industry is a matter of vital importance and the textile industry should take up its consideration without delay

Broadened Outlook

The broadening of outlook is as essential as the other considerations mentioned above and it is for the industry to take the necessary steps to ensure that the latest advances in manufacturing technique are adopted by them owners have a special duty in this regard for any neglect or mattention to possibilities and adoption of new develop ments will mean stagnation and as is well recognised stagnation is synonymous to a slow and painful death. We have to be sure that the fate which overtook our textule industry in the eighteenth century does not overtake us again. The forces of world competition will always be attempting to engulf us and it is for us to make certain that we keep our head high above the danger level. This is only possible by promotion of research for it is research alone that opens up new vistas of knowledge and leads to develop ments on which the long range prosperity of an industry depends

Textile Research

A forecaste of the wast possibilities that research offers has been available to the textile industrict for some time and at has already considerably benefited from some of the researches conducted at various research institutes. One of the terms that can be mentioned in this connection is the bhilawan coating of textile mill bobbins. The bhilawan enamed evolved in the laboratories of the Council of Scientific and Industrial Research has been shown to impair strength to bobbins mandactured from Indian woods, thereby multiplying their useful life several fold. The President of the hobbin Manufactureer. Association has testified that considerable savings have accrued to the textile industry as a result of this declopment alone. Further adoption of the practice may make it possible to do away with the import of foreign bobbins and shuttles.

Disposal of Textile Wastes

Like other industrial nuisances the disposal of waste waters of textile mills presents a problem. The large volume of these waters cannot be easily absorbed in the earth or mixed with municipal sewage for the chemicals present in the water have a tendency to destroy even the beneficial living organisms, thereby interferring with the practical history of the problem of the practical trials at over a dozen mills at Ahmetabad. Ways and means of ensuring a general adoption of the practical er now under consideration.

Tamarınd Seed Powder

The development of tamazind send powder as a uzing material represents the successful utilisation of a waste product and is therefore of considerable economic importance in the industry. With the current acute shortage of doubtuilfs in the country, the early likelihood of material becoming available for production of starch size cannot be easily foreseen and the use of substitutes is three.

fore an imperative necessity. Tamarind seed powder das-doped at the Forest Research Institute, Dehre Dun, has successfully filled the gap and helped the industry in a time of grave emergency. There are no reasons why the use of this material should not secure a permanent place in industrial practice. It is true that difficulties have been experienced in securing a uniform quality of the powder and the activities of some disreptute that manufacturers, who in order, to make quick money have been supplying indifferent qualities of the powder, have tended to bring it into disreptive but it is no reason why a useful material should be discarded Any difficulties attendant on its use are of a minor nature and could be easily overcome.

Textile Research Institutes

It is a happy augury to be able to say that according to evidence available some sections of the industry at least are aline to the importance of research and have already taken prehiminary steps in the right direction. In this connection reference may be made to the formation of the Ahmedabad Tevtile Industry's Research Association at a cost of our ment of India having made a contribution of Rs. 19 lakhs for the purpose. It is gratifying to record that these movements for industrial research associations in India were first strongly advocated by the Council of Scientific and Industrial Research.

Research Institute and to undertake, carry on or help to carry on research and other scientific work. In connection with the textile trade or industry and other trades or industry intended to the textile trade or industry and other trades or industries allied therewith or accessory, thereto, and which will among others include research in the following directions—

- Investigation into manufacture and improvement of materials used in the textile industry and other trades or industries allied therewith and developing new ones for manufacturing, testing and recording purposes
- (ii) Investigation into utilisation of the products of the industry
- (iii) Investigation into improvement of various machinery and appliances used by the said industry and other trades or industries allied therewith and developing new once for manufacturing testing and recording purposes
- (n) Investigation into and improvement of various processes of manufacture with a view to secure greater efficiency, rationalisation and reduction of costs
- (v) Insestigation and research into the conditions of work, time and motion studies, fatigue and rest pauses, standardisation of the methods of work, conditioning of factories, and diseases and accidents arising specifically out of employment in a textile mill

The Need for Standardisation

The primary need of Indian industry in general and textile industry in particular is the standardisation of raw material as well as processing and finishing so that the consumers in India as well as in foreign countries may be sure of getting a material on which they can rely. This is an essential requirement to which the industry has to devote considerable attention, constituting as it does the touch stone, by which the industry will rise or fall. The Textile Research Institute, Ahmedabad, will have an important role to play in helping the industry in improving their processes and products to ensure production of uniform quality material. This is only one direction in which the industry can hope to benefit from research. There are many others that will follow the active working of the research institute.

Research in Industry

This realisation of the importance of research for the promotion of industry is not restricted to the cotion textile industry alone. The sister jute industry which is of as great a national importance as the cotion industry, some years ago established the Indian Jute Mills Research Institute, Calesta, and his been financing it from voluntary contributions. Last year the Silk and Art Silk Mills collected a sum of Rs. 15 lakhs towards the formation of a research association for their industry and their research institute is being established in Bombay in the near future. The Indian woollen industry is also said to be considering a project for the establish ment of a research institute which will issuit it in solving its difficulties. These developments are indicative of the fact that the textile industry is fully alive to the benefits that will possibly accrue to them by pronoution of research

Collective Buying

Amongst methods to promote economies in the industry may be suggested the system of collective buying for the industry as a whole. In normal times even, collective buying is a vital factor in obtaining special terms from sellers and results in considerable savings. In times of emergency and particularly the abnormal times through which we are passing, the system assumes an added importance for while adding to the bargaining powers, it also ensures other incidental savings in buying charges, freights and insurance and the advantage easily mounts upto 15 to 20% if not more This is not a small saving and the adoption of the practice would bely in considerable savings of foreign exchange

The future of the textile industry is a matter of national importance and is closely interlinked with its expinision on sound technical and economic lines. The long term possibilities are immense and will be limited only by our abilities to grasp them. It will be necessary to take a long term view in all matters rather than have a feeling of complacence that the present position can be easily muntained. Rational listation and a watchful eye, open and rather keen to adoption of every useful development, can alone help to ensure for the Indivin textile industry the lofty straine which is visible in the horizon of the future and which it should be the aim of this industry to attain

THE STORY OF THE COTTON TEXTILE INDUSTRY IN INDIA

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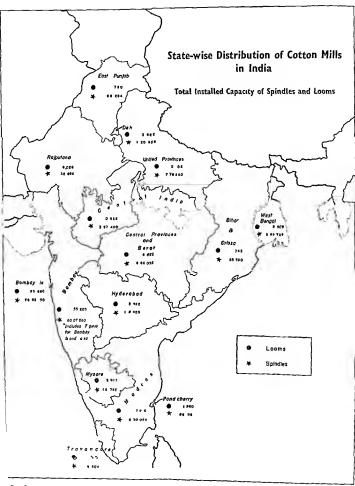
round about 10%. In the case of nulls which spin yarn for weaving them into cloth it is anywhere between 25°c and 30%. Theorists may mistakenly argue that labour is underpaid in a spinning concern This is not so There. fewer processes and a lesser number of men have to be employed Cotton alone forms almost 70% of the value of the output, while stores and power take up another 8% to In a weaving concern the cotton ratio is anywhere between 35% to 45% The finer the count the lower becomes this ratio Another 10% or 15% have to be pro vided for stores and power Owing to a larger number of workers employed on a larger number of processes the wage bill is naturally higher and therefore its ratio is also corres pondingly more It is a fashion among labour leaders to state that an average 20% labour ratio to the total value of output is a minor item and is capable of further increase This is utterly wrong because cotton, stores, power, dyes and chemicals running altogether as high as 50% to 60% of the value of the output have to be provided for and out of the balance 40% to 50% a wage bill amounting to 25 per cent or 30 per cent has to be debited This leaves a small sur plus for overhead charges like interest, insurance, rates, commissions, profits and dividends

During the last quarter of a century or so, while other fibres have come on the seene, King Cotton his still been able to retain its importance and with it too, the termle in dustry. Unfortunitely for us here in India we seem to be too slow in appreciating the value of research. If our textlle industry has to continue successfully, it is urgently

necessary that our industrialists think more in terms of adaptation to new changes in processes, varieties, methods effective.

The low per capita inconie in India coupled with climatic conditions and habits in many parts of this sub-continent ensure a valuable and growing market for the Indian textile industry. In addition to the home market the sky alone would be the limit for exports in our neighbouring indinatural markets, provided a systematic survey of export requirements, prices, etc is made, and a dynamically organised effort, as was done by Japan two decades preceding the last World War II, is undertaken

For the continued progress and prosperity of the Indian textile industry, cordial labour and employer relations and efficient progressive and honest management seem essential pre requisites Both these can only be ensured by proper supervision and guidance from Governmental quarters who whilst holding an even balance in judging textile questions, should at all times weigh and place the larger interests of the country above everything else. The recent history of textile management has left a bad odium. But, the abnor mal times we pass through can to an extent be blamed for certain deeds and misdeeds. However, forgetting the past and thinking of the finine of the Indian textile industry one feels, that, instead of idealistic planning for nationalisa tion or unhealthy interference or control, a proper super vision and guidance from the Government will prove highly beneficial to all interests concerned





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The INDIAN COTTON TEXTILE INDUSTRY

-ITS PAST, PRESENT AND FUTURE

By Dr. N. S R SASTRY, MA, MSc, PhD (Lond), FSS, Director of Statistics, Reserve Bank of India

N the sixteenth and seventeenth centuries the superfine hand made muslins and ealicos produced in India were world famous and were very popular in the households of nobles and even kings and emperors of the European coun In fact, trade in the above fabries attracted the busi nessmen of these nations to this country which ultimately resulted in its subjection by foreign powers. The foreign domination resulted in ruin of the industry as it had to make way for the cheaper imports of machine made goods of these countries after the industrial revolution. There is no use speculating on what would have happened to this industry had India remained independent. It is an interest ing fact that the establishment of the textile industry on modern machine lines and its further growth followed the course of the spread of the nationalist movement. No doubt, the high profits made by the cotton merchants during the American Civil War in the second half of the nineteenth century, the enterprise shown by certain businessmen in taking risks of establishing mills in the face of opposition of established factories in Lancashire, the lucrative trade, specially in coarse yarn, that developed with China and Japan, and the natural factors which were conducive to the development of this industry, particularly round about Bombay, were important factors for the growth of the industry in the earlier years. In fact, these aroused the jealousy of Lancashire industrialists, who used their poli tical influence to impose excise duties on this infant industry to countervail the small revenue duties imposed on their imports and who further encouraged the enactment of various labour and factory legislations to reduce the compe titive advantages in the lower costs in wages, etc. However, as will be seen in the following few paragraphs, developments at least during the present century coincided with various nationalist movements namely, the Swadeshi Movement of the first decade, the non-co-operation move ment of the twenties and the civil disobedience movement

of the thirties The two World Wars also had their own

impact on this industry. A brief survey of the progress during the present century is given below.

1.

The following table gives the number of mills, spindles and looms as also the total production of varn and piece goods in India (undivided) in certain years between 1900 and 1946

	No. of	No of	Loome	Millione of the.				
Year	mills	Spindles (000)	(,000)	Yarn	Placegoods			
1901	178	4541	405	673	120			
1906	199	5270	575	654	165			
1911	233	5095	858	825	267			
1916	238	8486	1121	691	278			
1921	219	7278	1335	624	403			
1925	277	8122	1546	807	533			
1931	314	9878	1753	986	872			
1936	370	9"31	1978	1054	782			
1941	298	100'8	2003	1577	1023			
1946	423	19354	2027	1335	947			
1918 with								
1901=100	(237%)	(3144)	(500°()	(231%)	(733_)			

It wall be noticed from the above that during the period of nearly half a century the number of mills and spindless more than doubled themselves, while the number of looms in creased five fold. The production of pair more than doubled whereas that of piecegoods increased to nearly eight times that of the earlier period. This shows the rapid advances much by the industry. The differential rares of increase in the production of pair and piecegoods is due to changes in certain circumstances. In the last quarter of the inneteenth century and in the early years of the twentich, India enjoyed a lucrative trade in pairs specially of the coarse variety with China and Japan. With the rapid progress made by the industry in these countries, specially in

Japan, India not only lost her trade, but required heavy protective duties to guard against the inroads made by the cheap Japanese goods in the Indian markets To make good this loss the Indian industry had to develop the Weat ing Branch and thereby capture the internal market at the expense of the British industry which established itself over a very long period The natural factors, the political factors mentioned above and the indirect help given by high revenue duties imposed during the first World War were important factors which assisted this growth. But during the early twenties, competition from the U.L. which was abruptly cut off during the Great War revived and, mean while, Japan who strengthened her competitive power during this war, flooded the markets with very cheap goods The unwise financial policies followed by the mill manage ments added to these difficulties and there was virtual threat to the whole industry This brought about a great wave of public feeling and the government were forced at first to suspend and finally in 1926 abolish the obnoxious excise duties Further a Tariff Board was constituted to examine the question of the need for protection or other form of The members gave divided advice and the gov ernment did not accept the recommendations of the majo This brought about a crisis between management and labour in Bombay when attempts were made to reduce costs by schemes of rationalisation and reduction of wages Later the Government adopted the policy of Imperial Pre ference and gave protection against Japanese imports by differential duties and the higher revenue duties necessitated . by the budget deficits of the early thirties gave and rect In 1932, another Tariff Board appointed to investigate conditions in the industry recommended protection. This gave a good fillip to the industry in the subsequent years The two Great Wars gave different rates of impetus to the industry At the time of the first World War, India was still in its infancy in industrial life, and stoppage of imports of mills stores and other requisites stifled the expansion during that period. Further, the war was confined mainly to the western theatre and many demands were not made on the Indian industry during the period before the Second Great War the industry expanded considerably This World War having become global, India was used as the base of operations for the Middle and the Far East, and great demands were made for the supply of textile materials. The industry rose fully to the occasion and this explains the greater expansion during the second World War than in the first

Regional Development

Bombay City was losing ground in yarn production both absolutely and relatively after World War I, but during the recent World War is made good progress in quantit hough the relative production increased only slightly Ahmedabad was steadily gaming ground till the thriters but during the recent war she seems to have lost slightly in relative position though absolutely production continued the upward trend. However centres outside the Bombay Presidency have been consistently gaming ground and improved their relative share from slightly above a quarter of the total to slightly less than half. In piecegoods also smullar trends are noticed except for the fact that the absolute production of Bombay was throughout increasing. Further, the relative share from the share for more production.

slightly higher than in the case of yarn and consequently the relative share of other centres is smaller. This is due to the fact that several upcountry mills produce only yarn to supply to handlooms.

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The following table gives the shares of different qualities of sam and piecegoods in total produce

		Y A	RN		PIECEGOODS					
	1 20 s	P1 30s	31 10s	Above 40a	Chad	Dbo-	Shirts	Col oured	Others	
1901-64 1019 22 1928 31 1934-37 1942-46 1917-48	33 2 67 8 59 1 54.9 62 0	14.9 29.5 31.8 26.3 21.3 1 7	24 25 61 118 100 112	02 04 22 63 54	107 57 41 32 17	19 0 21 0 26 2 29 4 10 3 27 5	25 6 27 1 24 0 24 8 25 2 23.5	17 3 26 0 21 7 20 3 20 4 20 1	24 4 20 2 21 0 2° 3 33 4	

From the above table we find that till the thirties while the share of coarse yarn had been coming down that of other counts had been going up but subsequently while the share of counts below 20s showed an upward trend specially during the World War II that of medium counts 21 30s marked a downward trend and though there was a slight downward trend for finer variety during the war they covered and advanced after the war. In piecegoods the share of childars went down rapidly and that of dhotter increased though there was a reversal of trend during the war and recovery later. The position of shirting and coloured goods stabilised after 1930 and the rest also except during the war when there was a sudden spurt and reduction later.

We may further conclude that India has been expanding her place in the home market by spinning finer varieties of yarn to manufacture dhoites and other kinds of piecegoods During the war there was more demaild for rough cloth, specially for military purposes, and even for civilian standard cloth, but this trend was reversed after the war

Position of the Industry in the Home Market

The following table gives the percentage shares of Indian and imported piecegoods and handloom products in the total consumption in the country *

	Fore ga	Ind an	Handloom
1901 04 1919 92 1938 31 1931 37 1943-46	6° 36 35 15	15 47 43 59 70	23 22 29 26 30

The above table shows that at the beginning of the present century India depended for nearly two thirds of her requirements of cotton piecegods on foreign imports and the Indian mills supplied only 15%, and the balance the hand loom manufacturing piecegods from yarn either imported or supplied by local mills. The end of the first World War as we the reversal of the trend, the share of foreign unyouts Lalling to 36% which was entirely taken by the Indian mills.

^{*1} le Sary \ SR I Stat teal S d of I das I l talde ly

Not much changes could be noticed till 1931. But with the grant of protection to this industry, the share of imports came to 15%, and the share of Indian mills increased to 59%, thus within a period of about 35 years their relative positions were exchanged. Handloom production did not gran much in this process. The recent World War completely saw the elimination of imports which are now less than even ½%.

Exports

The following table gives the value of exports of piece goods from India

Year	1	Value of goods (n m limn supees)
1901-04		118
1919 27		901
1978-37		219
1934 37		77
1943-46		-47

The above table shows that the exports form only a very small part of production in India and they nearly doubled during the first two decades of the present century. This expansion took place mostly during and immediately after World War I Afterwards the competition from Japan increased and there was no more further expansion. In the thirties, the country required protection against foreign imports even in the home market and naturally exports dwindled except in some special kinds in which India had an advantage, e.g. demand for lungis, ext. from India had not only to supply all the military requirements in the Eastern theatre but had to supply to the civilian markets in Far and Middle East and parts of Africa which were for merly supplied by Japan and the UK. This is responsible for the high average of exports in the tennal 1943, 46

Erom the above analysis we have seen how India gradually expanded her textile industry with the help of several factors and has reached a position when she can meet all her internal demands except in some special lines. Any further expansion can take place only by an increased demand from home or foreign markets. Several planning committees have fixed targets for further increase. The basis for their calculations appears to be a crude method of extrapolation rather than any scientific study of demand. The recent fall in production is stirtlyied to labour troubles and other factors. We have also to take into account the steep fall in military demand for coarse and medium types which is not compensated by the increase in the civilian demand as it is confined manify to finer types. The recent reimposition of control is attributed to the falling production

and consequent deficiency in supply. No doubt, in the sellers' market business people exploited the greater demand for finer goods even at higher prices during the recent inflationary conditions and this filtered into the prices of more inferior types also The Government have been taking all possible measures to increase production. At the same time we see the paradoxical picture of overstocking in mills and the consequent closure of some of them Hence, unless prices come down, effective demand is not likely to increase. specially in some types This is becoming difficult due to the rigidity in wages dearness allowances, etc., and the high perces of raw cotton. The partition of India has created further troubles for long staple cotton which has mostly gone to Pakistan,* and the recent devaluation increased the prices of imports from the dollar area by over 40°. In these circumstances, unless some measures for greater efficiency and reduction of production costs are taken the industry cannot look for expansion even in the homemarker In the foreign markets, the position is even worse India enjoyed a measure of insularity during the war. In fact there are complaints regarding the quality and other specifications of goods supplied. If India lias to retain the position when conditions of a sellers market are gradually giving place to a buyers market and also when competition from the belligerent countries starts after the transition period of reconstruction several important measures have to be taken both by the industrialists and the Government The reputation of high standard in quality and integrity en business dealings should be built up Exports of picce goods may have to be checked by the Government on sampling inspection plans at the ports of slupment Ways and means of supplying the requisite quantity and quality of cotton should be found out The costs of production should be brought down by all possible means with the willing co-operation of the capitalists and labour. The in dustry should have schemes of research for improved methods in the various factors of production. It is gratifying to note that already one Textile Research Institute is started in Ahmedabad and there are proposals for developtng such institutions in other important centres also Finally, in formulating plans for development instead of following the old time rule of thumb methods we should be guided by results based on proper marketing research studies regarding effective demand competition from substi tutes dispersion of industry and other factors on the lines now in vague in advanced industrial countries. The State should also give a proper lead to the industry by affording necessary facilities and encouragement but at the same time keeping a watch that they are not misused. Otherwise such difficulties which Bombay felt during the twenties of this century may recur in other industrial centres to the detri ment of the economy of several regions

REGIONAL

DEVELOPMENT

OF THE

Indian Cotton Textile Industry

By Dr. N. S. R. SASTRY

HOUGH the first cotton mill was established in India as early as 1818 at Fort Gloster near Calcutta, the true foundations for the development of this industry were laid in 1851 by the floating of the Bombay Spinning and Weaving Mill In those years of free trade the essential requirements for the success of any industry were the availability of power, raw materials, finance and managerial ability to stand the competition of established competitors from abroad Some shrewd business people realised that it would be more remunerative to manufacture the cotton produced in this country for local needs and trade with neighbouring countries rather than export the raw materials to the UK and import the finished goods thereby incurring heavy freight charges. In those early years manufacture was naturally confined to only course varieties of yarn and piecegoods where the advantage of these freight charges was highest Calcutta and Bombay were the focal centres for trading and both of them had the advantages of entre preneurs for promotion of industry Though Calcutta was favourably situated for power resources, having been situated very near the coal fields, Bombay had the hydro-electric power and also could import coal cheaply from abroad The deciding factors in attracting the cotton industry to Bombay seem to have been the humid climate and vicinity of raw cotton markets Further, Calcutta had developed in terests in several other large scale industries, namely coal, jute and plantations

Bombay Leads

The statistical data for the earlier years is very meagre, but the progress made in the later years can be seen from the following table

lmr	ha of mills	Na. of spindles	No. of looms (000)
1551 1966 1976 1540	1 13 47 66	29 309 1,100 1,461	34 91 156

It will be seen that in the earlier stages the progress was very slow, and the industry was confined mainly to the spinning operations. Out of the 56 mills in 1880, 75% were situated in Bombay Presidency of which Bombay City claimed the major share, namely 32. It will be noticed that the industry received a good impetus during the American Cavil War from the cotton merchants of Bombay who made money by exporting cotton to the UK. to replace the American imports. The progress in the succeeding years of this century can be seen from the following table:

	BOMBA	2	OF BOMBAL				ALL-INDIA			
(0)	(2)	(3)	(1)	(2)	(3)	(1)	(2)	(3)		
37 43 57 69	993 1,347 1,919 2,124	10-9 12-0 14-3 20-2	10 19 24 33	187 203 451 533	16 25 41 72	57 8 134 148	1 514 2 145 3 352 3 810	13.7 16.6 24.5 35.3		
	(1) 37 43 57	(1) (2) 32 993 49 1,347 67 1,919	BOMBAS (U) (2) (3) 32 993 10-9 43 1,547 12-0 43 1,547 12-0 45 1,547 14-8	BOMBAY OF (1) (2) (3) (1) (2) (3) (1) (2) (3) (1) (2) (3) (1) (3) (4) (1) (1) (1) (1) (1) (1) (1) (1) (1) (1	BOMBAY OF BOMI (1) (2) (3) (1) (2) 52 992 10-9 10 187 43 1,347 120 19 203 67 1,679 143 24 451	BOMBA1 OF BOMBA1	BOMBA1 OF BOMBA1 A	BOMBA1 OP BOMBA1 ALL-MAIL (1) (2) (3) (1) (2) (3) (1) (2)		

(a) to of m lb (2) to of sp ndles (1000) (3) to of loons (1000)

The above table clearly shows the rapid progress that was being made by the industry Both the number of mills and their capacity doubled up in Bombay, while the other centres were expanding more rapidly with the result that the rate of increase of all India was more than that of However, Bombay City and Province were main taining their premier position This natural development is to be expected because, with the success achieved and profits made by the industrialists in Bombay, entrepreneurs in the upcountry centres who were more favourably situated than this city in respect of the raw material and the market for manufactures, should have been attracted to this business Fortunately for Bombay City, a growing trade in these manufactures was developed with China and Japan and this helped to sustain this industry in spite of the growing internal compension It should further be noted that nearness to raw material is not a primary factor in the location of this industry Though most of the mills are in the cotton growing regions, there are important cotton belts in the Pumps in the north and the Ceded Districts in the south

which do not figure in this industry. This anomaly can be understood when we notice that England and Japan, the two leading cotton textile producers of the world, have to depend on imported cotton for their industry. Even in America, the northern provinces were the leading textile manufacturers for a long time, whereas the southern provinces produced the cotton. The concentration of a large number of mills in the same place led to other external continues and all these helped to make Bombay the leader of the industry in the country.

Till 1896, detailed statistics of production were not required to be supplied by these mills and so comparison of the progress in production is not possible. But these statistics give a more realistic picture of the regional distribution of the industry. The following table gives particulars for the subsequent periods.

Production of Yarn (million lbs)

	вомі	BAY	AHM BA	EDA-	REST BOVE	BAY	RES:	T OF	rodes
	Product on	Total	Production	4 of Grand Total	Production	Z of Grand	Production	of Grand	Grand Total Produc
Ayerage 1901-04 , 1911-14 , 1919 22 , 1978 31 , 1934-37 , 1934-47	326 349 336 229 282 329 465	57 59 50 29 27 27 30	45 58 79 130 169 187 205	8 10 12 17 16 15	46 52 53 65 77 23	S 8 8 8 7 7	1.99 198 195 259 510 634 764	27 39 30 43 49 61 50	576 663 633 78 1 03% 1 233 1 635

Production of Piecegoods (million yards)

		вом	BAS	AHM)	EOA O	RES BOM	P OF BAY	REST	TO F	Total Produc
		Production	% of Grand	Production	Z of Grand Total	Production	Total	Production	% of Grapd Total	Graul Total
Averag	1901=01 1911 14 1919 22 1929-31 1934-37 1937-40 1944-47	293 616 574 798 1 129 1,352 1 514	54 53 53 25 25 23 23 24	102 259 3*2 643 990 11:69 L,017	19 21 23 29 29 26 26 23	47 87 125 175 213 244 205	8 7 8 6 6	99 209 230 675 1 171 1 458 1 634	18 18 17 29 33 35 37	51\ 1 173 1 651 2 991 2,513 4 122 4 431

From the above tables we find that in the beginning of this century Bombay Presidency accounted for more than 70% of the production of yarn and over 80% of piecegoods. Of the former, the shares of Bombay island and Ahmedabad were 57 and 8 and of the latter 54 and 19 respectively. Since then till the end of the Post War I trennium there had been a slow but persistent fall in Bombay's share in jarn, which was shared between Ahmedabad and other upcountry centres. But still it continued to be the chief producer with a share of more than 50%. Bombay is loss was chiefly due to the loss of export trade in jarn with Clina and Japan, and the increased production of piecegoods could not fully compensate this loss. In piecegoods it did not lose much ground because there was an expanding market for indigenous production in competition with imports



Alimedabad

But after this period, several new factors influenced the dispersion of the industry away from Bombay The change in the direction of Bombay's trade from foreign to internal markets weakened its advantage in transport costs Unfor tunately for Bombay, about the same time the railway rates were revised from low rates over long distance from ports to a more equitable basis according to the distance travelled and this still further weakened its position in the internal markets Again in Post War I period, rents, taxes, water rates and other charges for municipal services were raised in that city, and these contributed to an increase in that centre All these factors tended to increase the burden on the indus try in Bombay, and the situation was accentuated by the revival of imports from Lancashire and new competition from Japan Ahmedabad and other inland centres had the advantage of lower freight charges for raw materials and finished goods, and the rents, taxes, and labour charges also were lower there Again, the development of electric schemes in Madras and the United Provinces gave a fillip to this industry in those centres Of all the inland centres, Ahmedabad came out best for several reasons It is near the cotton growing tracts, specially of the medium and long staple varieties, and has a big market in the neighbour ing regions of Kathiawar, Gujarat, the Punjab, the United Provinces, Delhi etc It has, in addition, managing agents who confined their activities to a limited number of concerns and hence had more time to pay personal attention to many details Fortunately, it could command a labour force which was more steady and less militant than that in Bombay Also as most of the mills in Ahmedahad were newly established the machinery was modern and superior to those in Bombay

With the growth of the external and internal competition many of the mills in Bombay came to trouble, and after 1923 the managements tried to reduce their costs at the expense of labour This led to a series of labour strikes of greater or lesser intensity culminating in the great general strike of 1928 29 which shook the foundations of the in dustry in that centre Ahmedabad and other inland centres seized this opportunity and increased their production at the expense of Bombay. By the end of the triennium 1928 3t, Bombay's share in varn came down to 27% compared with 57% in the beginning of the century, Ahmedabad's share increased to 17% from 8% and the share of other parts outside hombity Presidency increased to 46% from 27° In precegoods, the respective percentage shares were 35 and 54, 28 and 19, 29 and 18 Whereas all other centres increased their production of varn to nearly three times that of the earlier period, Bombay's share came down by nearly a third. In piecegoods, whereas other centres increased their production by nearly 6 times, Bombay could increase it only by 3 times

During the thirties the fall in the share of Bombay slowed down considerably, whereas the increase in the share of Alimediabad was arrested and even fell by a point just prior to the war. But during the World War II, both in yarn and piecegoods, the share of Bombay increased at the expense of both Abmediabad and Rest of India. As this has pencil in an expanding market provided by the war, it

can be inferred that there was larger surplus capacity in Bombay which could be put to profitable use

The following figures show the average production per year of different varieties of yarn and piecegoods in the different regions

Yarn (million lbs)

_				Counts above 40
	(1) (2) (3) (4)	(1) (2)(3) (4)	(1) (2) (3) (4)	(1) (2) (3) (4)
1919-22 1918-31 1914-37	144 59 49 33 142 69 48 396	38 21 11 12 90 45 15 45 7 60 19 97 84 46 27 122 104 46 26 142 92 4 21 161	30 31 4 40	1 t 1 6 - 2 2 18 °4 2 11 2J 34 2 20 30 38 4 28

(1) Bo ala () W ed bad (3) Rest of Bomba (4) Rest of Ind a

The above table shows that till the end of 1931, Bombay was losing heavily in the production of coarse yarn and though the production of medium counts nearly doubled it could not compensate for the loss in the coarse varieties and the production of finer counts was negligible other centres were expanding rapidly in all varieties thereby bringing down Bombay's share in the aggregate. The imposition of higher import duties in the emergency budget of 1931 and the granting of Tariff protection to the indus try in subsequent years brought about new trends The fall in the production of coarse yarn in Bombay was arrested, and with the increase in production of medium and finer varieties a good part of the ground lost in the total production was recovered The share of Bombay remained steady without further reduction But an important point to be noticed is that as the competition from centres nearer the markets had been increasing, the older centres like Bombay and Ahmedabad had been switching on to superior varieties of yarn. From the table given above it will be noticed that between the triennium beginning with 1928 and the triennium beginning with 1937 Bombay increased its production of coarse yarn of counts below 20s from 136 million lbs to 142 million lbs per year, in counts 21 to 30s from 72 to 104 million lbs, whereas in counts 31 to 40s it increased from 15 to 53 milhon lbs and in counts above 40s from 6 to 29 million lbs Ahmedabad showed similar rapid improvement in fine counts and slight improvement in coarse counts less that 20s, in counts 21 30s actually lost 14 million lbs, 10 from 60 to 46 million lbs Though the mills outside Bombay also showed similar improvement, their share of fine yarn in their total production was much less than that of Bombay and Ahmedabad World War II, however, slightly changed the trend The production of coarse yarn increased while that of other varieties was either stagnant or slightly decreased and in the former, Rombay's share was higher than that of other centres Naturally the relative share of Bombay increased during the war at the expense of Ahmedabad and other centres outside Bombay Presidency

Piecegoods (million vards)

	_	DHO	S	SHIRTINGS			C	GO	URI ODS	D		
_	(1)	(2)	(3)	(4)	(1)	(2)	(3)	(4)	ti)	(2)	(3)	(4)
1901 04 1919-22	19	63	9	17 64	104 230	16	17 31	15 45	15	31		8
1928-31 1934 37	162 331	251 321	57 68	223 436	262 375	154		126 254	226 218	139	58 65	196
1937-40 1944 47	39 £ 319	312 244	65	514 513	459 445	218 243	35 50	333 412	251 335	346 352	72 81	25° 25°

(1) Bombay () Unne tal at (3) Rest of Bon bay (4) Rest of In 1 =

At the end of World War I, Bombay held a very strong position in the production of shirtings and coloured goods and the production of dhotes was very little. In the twenties, there was heavy fall in the production of coloured goods and slight fall in shirtings compensated by the remendous expansion in the production of dhotes. Ahmeda bad and other centres improved in all lines with the result that the relative share of Bombay came down. Thanks to the Tariff protection in the thrites, Bombay could expand the production in all lines though the increase in coloured goods was very small. During this period, the centres outside Bombay Tresidency gained slightly in the relative shares at the expense of both Bombay and Ahmedabad.

During the Great War II the production of dhotes declined both in Bombay and Ahmedabad, and slight expansion was recorded by centres outside Bombay Presidency, the production of shrtings and long-loth was slightly reduced in Bombay City, while in all other centres it increased However, it was only in the coloured piecegoods that the largest increase took place in Bombay though other centres also improved to a smaller extent

Conclusion

World War II made great demands on the productive capacity of India 8 Cotton Textile Industry, and restrictions had to be imposed on the civilian demand as well as expostion neighbouring countries whose supplies from Furope and

Japan were completely out off at the same time Deficiency in machinery deprived the country from taking full advan tage of the opportunity that arose Further, the country produces mainly short staple cotton and even before the war had to import large quantities of long staple cotton The new demand is for finer qualities of cloth which requires more cotton of this latter variety which has to be imported to a large extent from hard currency area The partition of the country aggravated the situation because a larger part of the area producing the limited quantity of long staple cotton has gone to Pakistan. The unfriendly attitude of that country and the breakdown of trade after the devaluation in September 1949, have strained the indus try to a great extent. Efforts are being made to step up production of long staple cotton in the country and to arrange for necessary imports. But in course of time the advantages both in the internal and external markets may be lost from resumed competition from exporters in Europe and Japan Unfortunately, the trade connections established during recent years are being undermined by the doubtful integrity of certain exporters who are spoiling the fair name of the country If the export market is lost and competition affects even the internal market, the position of several mills in Bombay and Ahmedabad may be seriously undermined In recent months several mills closed down for various periods due to piling up of their stocks and the employ ment position became very precarious. If this malaise develops beyond control it will result in untold misery. In fact on the eve of the war, Ahmedabad was developing the same symptoms as Bombay suffered from, immediately after the boom period of 1919 22, and the demands of war postponed the solution of several problems. The newly established Planning Commission may have to pay serious attention to this great industry if the internal demand does not keep up to the levels of production In this connection, it should be noted that even if the relations with Pakistan improve, the country has to be prepared for the loss of a big slice of that market, as that country naturally will like to develop its own industry, by exploiting the facilities found in its territory, and may get its supplies from various foreign countries with which it may enter into mutually advantageous trade agreements

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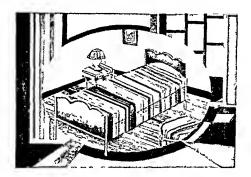
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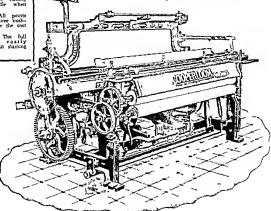
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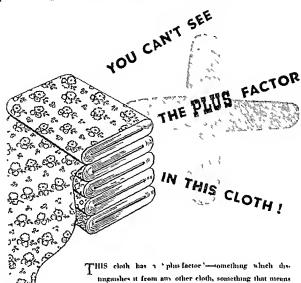
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By

Sir PADAMPAT

SINGHAMA

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site of the home production as well as foreign imports. As the amount of consumption of cloth varies from place to place there being more consumption in industrial areas and less in other areas we can have an idea of the total availability of cloth only on the basis of per capital consumption of cloth. I have therefore quoted the per capita figures of consumption to enable the readers to form an idea of the total amount of cloth a valiable to our people.

-And Problems

It is true that the per capita figure of cloth available in our country today is very low and needs substantial improvement to make our countrymen happier in the matter of consumers goods. Hence to increase the production of cloth is a problem of outstanding importance. Personally I feel that there is sufficient scope for the uplift of the indian Cotton Textile Industry and the number of Cotton Textile Mills in the country can be gradually increased thus creating opportunities for more and more employment functionated; on account of the partition which has placed

a large area of cotton cultivation in the hands of Pakistan, our country is faced with cutte shortage of cotton. The scarcity of cotton has brought about considerable rise in its piece which in turn has enhanced the cost of production of eloth. To my mind the solution of the problem of our Cotton Textile Industry lies in the solution of the following three problems:—

- (1) Production of more cloth
- (ii) Production of more cloth at a cheaper price
- (iii) Production of more cotton

Suggested Solutions

These problems have got to be tackled and tackled sue cessfully. In order to have more production the textile

workers will have to pitt in harder work and increase their productivity. Without increasing the productivity level the solution of the first problem. We more production of cloth would be an idle dream it is equally important for rasing cloth production and bringing down its praces that more and more cotton is produced in the fields and is made available to the industry at a chaeper price because so long.

as there is shortage of cotton shortage of cloth will continue and scarcity of cloth is bound to raise its price level. In view of the acute shortage of raw material, there is in in creasing demand for Indian cotton. The problem of how to meet this demand is to be tackled scientifically and speedify, otherwise we will have to continue facing the present difficulties for many years to some

Increasing Cotton Cultivation

To my mind one of the most important means to solve the problem is to increase the area under cultivation of cotton of improved varieties suitable to spin above 20s counts as far as practicable. The agriculturist must be provided with such cotton seeds and manure as may improve the variety of cotton and increase the yield per acre to the maximum extent. For this purpose the Agriculture Ministries of the Centre and the States will have to co-ordinate their efforts and find out ways and means whereby the outturn per acre may be increased so as to meet the requirement of the country. I feel that even with the present area under

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cotton cultivation the country can produce the required amount of cotton provided the yield per acre is raised. This matter, therefore, needs first priority in the working programme of the Agriculture Vinnistries of the Centre and the States. The Government have to bunch a vigorous campaign in this connection and intensify the research work for increasing the yield without going into the botheration of increasing the present acreage. I am of opinion that it honest and sincere efforts are made to achieve this object, the country can produce at least as much cotton as is neces sary for the time being to meet her present requirements of about 13½ to 14½ yards per head. If necessary attention is not paid to improve the variety of cotton and if the present yield is allowed to continue to be low as it is now, I firmly feel that cloth production will dwindle down further and bring in more misery to the consumers.

The Problem of Labour

The labour problem too cannot be ignored It is true that the wages of the textile workers in general have consi derably increased out of all proportions to the increase in the productivity of labour But I would hardly share the view that a technician should get less than what he is getting today, provided of course he produces more and more There are two alternatives to produce more cloth at cheaper price One is 'rationalisation' and the other is 'reduction in the wage level' Looking to the present conditions I would prefer the former alternative to the latter I am fully convinced that rationalisation would go a long way to solve our problem Rationalisation if worked on sound lines would reduce the cost of production and thereby the price of cotton cloth A reduction in the price level would inevi-tably raise the demand of cloth, and to meet this demand more mills would come into existence which would create a vast field for employment. In order that the Indian Cotton Textile Industry may retain good technicians, the alternative of 'rationalisation' must be given the first priority and that of 'reduction in wages' may be given the second place. Looking to the present economy of the country I feel that must adopt ways and means to secure increasing demand of cloth for the home market as well as from abroad I to only then that the Cotton Textile Industry of the country can flourish

Export Markets

As already stated, production of more cotton in the country is the prime need of the hour. If the country is unable to produce its own cotton to meet her requirements, she will have to go in for foreign imports and will have to export some cloth manufactured from the imported cotton. The cloth manufactured out of the imported cotton can be exported to foreign countries only if it completes favourably with the cloth manufactured in other countries of the world like USA UK and Japan. The country will have to see that the Cotton Teetile Industry does not only meet her in ternal demand but is also in a position to make appreciable exports of cloth to foreign countries so that she may can some exchange in terms of Sterling and Dollars which are so essential to build up her economy in the international market.

Mill Stores

In addition to the above, the Indian Cotton Textle India ty has other difficulties too. The indiatry has to depend on foreign countries for most of its requirements of stores Although some of the articles of stores are being manufactured in the country itself; yet many of the important items such as bobbins, spare parts, beltings, electrical fittings, etc. are more or less the monopoly of foreign markets. It is, therefore, necessary that arrangements are made for manufacturing as many articles of stores in the country itself as could be possible, otherwise the industry, will stare for want of such articles of stores and will remain in the hands of foreign markets.

MILL CLOTH

If hand spun and han I woven khadis whether conton wood or sill, is to be the order of the day, what is the place of mill doth in the national economy is the question often asked. If millions of stills get could receiv and stand and take up the message of the spinning, whi I tooked I know that there is no room for mill doth whether forces or Indian in our domestic economy and that the nation will be all the better for its entire despersance.

This statement has nothing to do with machinery or with the propaganda for boyco c of foreign cloth it is purely and simply a question of the economic conditions of the Indian masses

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The Role of the Cotton Textile Industry In India's Foreign Trade

By C. C. DESAI, I.C.S., Secretary, Ministry of Commerce Government of India

THE Indian textile industry today is called upon to play a role in the country's international trade which is far beyond what was ever dreamt of even by the far sighted pioneers who laid the foundations of this great industry For until only a couple of years ago the ambition of the industry was to make India self sufficient in cloth and inde pendent of imported supplies Throughout her past history, India has been a net importer of cotton textiles on a ver) substantial scale About 1858 our imports from Great Britain of both cloth and yarn constituted one third to one half of our total imports from abroad and by 1913 14 the) had reached a peak figure of 3,000 million yards which was 21/2 times the indigenous production During the first World War and the interwar period there was a steady development of the industry, the number of mills increasing from 272 in 1913 r4 to 389 in 1938 39 Nevertheless, the output of Indian mills was not enough to satisfy internal requirements, the contribution of the Indian production to domestic consumption being roughly estimated at 65°. It was small wonder therefore that the textile industry con centrated more on eliminating competition from foreign cloth within the country than on capturing overseas markets

To say this is not to suggest that India was not exporting precegoods before the second World War Actually something like 200 million yards of Indian precegoods had already begun to find a market in neighbouring countries before the outbreak of the second World War The war gave a further stimulus to the industry and the export trade Under the impetus of war orders from allied government and changes in the world trade in piecegoods, production of cloth and yarn in India steadily increased year by year from 1303 29 and reached a record figure in 1943 44 Total production of yarn increased by about 29 per cent from 1303 2 million lbs in 17943 44 and that of cloth by 14 per cent from 4269 3 to 4870 7 million yards during we same period Though there was a slight decline rhereafter, the production was always maintained at a level substantially higher than the pre war level

This increase in production combined with control and rationing of cloth in the country, contributed to an expan sion of our exports which increased almost phenomenally from 177 million vards in 1938 39 to 771 million yards in 1941 42 and 819 million yards in 1942 43 which was the peak year for production as well as exports. This expan sion had been helped by the concentration of UK on the development of war industries which not only reduced India's imports but also enabled her to increase her exports to markets in the Middle East countries and East and South Africa where British competition was keenly felt Simi larly the outbreak of War with Japan completely eliminated India's important rival in Ceylon and the South East Asian countries, and India was thus almost the sole supplier of cotton textiles from Middle East to Far East In 1938 39 Burma was our chief consumer, exports to that country amounting to Rs 2 4 crores in value Ceylon, the Straits Settlements, Nigeria, Iraq, and Mauritius and Dependencies came next, but their total off take was less than 2 crores In the peak year 1942 43, Australia was the largest consu mer with a total off take of nearly Rs 7 crores, Iraq took the second place with over 4 crores while Ceylon, Aden and Dependencies, Iran, Kenya Colony, each took Indian textiles worth between 2 to 3 crores of rupees Six other countries imported cloth to the tune of over a crore of rupees each

After the peak figure attained during the war, there was a gradual dechie in exports owing partly to increased internal consumption due to relaxation of control and partly to greater competition from other producing countries. Our exports in 1946 47 amounted to nearly 25 crores and were 35% below the peak exports in 1942 43. There was a turther decline of 8x 7 crores in the following year when the total exports were about half the record figure. In the year 1948 49 the downward trend continued, although owing to emergence of Pakistan as a foreign market the statistics of total exports including Pakistan was removed that the period of the statistics of two exports including Pakistan was previously a part of infernal consumption of Pakistan was previously a part of infernal consumption of a so the countries.

were concerned, the actual export during 1948 was only about half the total quota of 300 million varids set aside for the purpose

A mere decline in the volume of exports would not have been a source of worry if India's balance of trade position had been comfortable and if the fall in exports had meant an increase in internal consumption which the country could In actual fact, the full effects of the partition on the textile industry as well as the country's overall economy began to be realised only towards the beginning of 1949 The outstanding effects were that in general India's over all balance of trade position had worsened and one of the main reasons for this was that instead of being a net and substantial exporter of raw cotton, India had become an important importer. It became clear that the volume of imports of cotton required to keep the textile industry in full production could only be financed in terms of foreign exchange if there were substantial exports of cotton textiles taking place at the same time. It also became evident that with the partition of the country the textile industry had lost from its internal market a substantial consuming area, thus resulting in a surplus capacity, which must in its own interest find an export market either in Pakistan or else where The maintenance of production and employment in the industry not only needed the import of raw cotton but also an export market for its product

With this realisation, which coincided with the emergence of an overall adverse balance of trade came a concerted effort in which the Government, the industry, and the trade all played their respective parts for the development of India's export trade in cotton piecegoods. The export duty on cotton piecegoods was removed. Quota restrictions on the volume of exports were abolished. Price control over exports to all destinations was reimposed. Meanwhile the Export Promotion Committee after examining competent witnesses recommended that India can afford to, and indeed must, export 800 million jards of cotton piecegoods annually. The target was accepted by Government and it is satisfactory to note that the monthly volume of exports by the end of 3949 had doubled in comparison with the export in the middle of 1949 and reached a figure which gives

room to hope that the figure of 800 million yards annually would be achieved. The only feature in this export boom in cotton piecegoods which may be said to be unhealthy is the fact that all the export is not of finished goods directly intended for consumption in importing countries, but it in cludes a certain portion of unfinished cloth which goes to Manchester for being processed further and re-exported to other countries. The industry should really take credit for export of finished goods and should moderniae is machinery so that the export is limited to finished goods and does not extend to grey cloth. There is reason to believe that the industry appreciates this point and is taking steps to meet it.

That however is not the end of the story. We enter the year 1950 with grave anxieties regarding the adequacy of the supply of raw cotton without which our production cannot be sustained. Government are determined that the shortage during the year shall be made up by imports for which we are able to release foreign exchange on account and only on account of the excellent showing of our export trade in piecegoods which has received a further slip from devaluation. Nevertheless Government cannot with equal minty face the prospect of maintaining the present level of cotton imports year after year. Measures to story up the cultivation of cotton have therefore assumed an importance and an urgency which had not earlier been foreseen.

The objective of every well washer of the textile industry can in the circumstances as they are today be but one. The industry must make the maximum possible contribution to the country's foreign exchange resources, while at the same time the standard of hring of the people of India should common to rise enabling them to afford a larger yardage of cloth per capita thain in the past. If this twin objective is to be achieved, the industry must work to the utmost limit of its capacity providing employment on as large a scale as possible, giving wages which will be high because of better productivity, reling increasingly, and it possible evolusively, on cotton grown in India providing enough cloth for internal needs and yet keep the export markets now embracing countries far and near from Canada to Hong Kong and from Sweden to New Zealand

SWADESHI

Whitms Gandhi defined Swadzhi as that spirit in us which restrict us to the u.e. and since of our immediate surroundings to the exclusion of the more remote. It is necessary to attend to the primary physical needs of man and satisfy them by the ure only of things that are produced by himself or his immediate neighbours. The primary needs are food, debung and shelter. We have not loss altogether the art of providing and preducing our own food although we are steadily losing that also a long-term that are providing and preducing our own food although we are steadily losing that also consists of the steady of the control of the con

DR RAJENDRA PRASAD
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"Economics of Khadt Navpvan Press Ahmedabad

INDIA'S TARIFF POLICY

By D. L. MAZUMDAR, I C S.

Member Secretary, Indian Fiscal Commission

T ILL the beginning of World War II the Indian Tariff polics was moulded by three different sets of influences, viz.

- (i) the early liberal tradition which it had inherited from the British trade policy of the second half of the 19th century, a tradition which persisted in this country with almost undiminished vigour fill the end of the First World War
- (11) the policy of discriminating protection formulated by the Indian Fiscal Commission of 1921 22 and accepted by Government of India in
- (iii) the commitments arising out of the system of Imperial Preference in the first quarter of the century, and subsequently out of the Ottawa Agreement of 1932 and other international agreements which affected India by reason of her membership of the British Commonwealth

Consistent with its early free trade bias, the Indian tariff structure was essentially a source of revenue till 1923 when the policy of discriminating protection was adopted by the Government of India Since then it has acquired, in parts, some slightly protective bias The present tariff structure is briefly as follows

Import side

- (a) Revenue Duties-Standard and Preferential rates
- (b) Protective Duties—Standard and Preferential rates of duty
- (c) Special rates for Burma

Export side

Export duties are generally levied only for revenue pur poses Till the recent devaluation of the rupee, in Septem ber 1949, these were export duties on six items viz Irse, jute—raw and manufactured, raw outon tea, manganese ore, cigarettes, eigars and cheroots The rates were either ad valorem or specific, but there were a few cases of combination of these forms of starfi and of sariff valuations

Immediately after devaluation an Export Dutes (Emergency Provisions) Ordinance 1949, was promulgal end which empowered Government to levy export duties on coal iron and steel oilseeds vegetable oils, vegetable products, shellac and unmanufactured tobacco Under this Ordinance Government has levied export duties on iron and steel, mustard oil and on black pepper. The exiting export duty on hessiants has also been ruised from 8s 80 to 8x 350 per ton. These new duties and the enhancement of the duty on hessiants has also been duties and the enhancement of the duty on hessians fall outside the traditional

course of tariff changes, and represent an item in India's economic defence strategy designed to safeguard her economy against the sudden dislocation caused by the devalua tion of the rupee and the contrary currency policy pursued by Pakistan As the Honble the Commerce Minister of the Government of India observed in course of the debate on devaluation in the Indian Parliament ' An Ordinance has been issued authorising the Government to impose export duties on various commodities. The object is to prevent a speculative rise in prices and also to ensure that if an increase in rupee prices of export commodities is inevitable the element of the increase comes to the exchequer and does not inflate profits wages, etc. A further object is that when both the demand and supply of the commodity is inelastic we should not suffer a loss in foreign exchange on account of the cheaping of our product

Carly History

As has been already said till 1923 the Indian Tariff system was essentially a revenue yielder and its structure was also comparatively simple Almost all articles of import liable to duty were subjected to one of the three rates—2½ per cent, low rate, 10 per cent general rate and 30 per cent, lutury rate

In the early days of British rule, export duties were also considered almost exclusively as a source of resenue and most of the articles on the export list were subjected to low rates of duty. Their injurious effects on trade were, how ever, soon realised and in 1880, export duties on all articles except rice were removed. During the First World War, revenue considerations again necessitated the imposition of export duties on some selected articles—the two first selected being

(t) jute, both raw and manufactured,
(ii) tea

The only departure from this general policy as regards export duties was made in 1918 When an ad talorem duty of 15% was levid on the exports of hides and skins for the protection of the indigenous tanning industry. This duty was, however, reduced to 5% in 1923, thus losing its protective character and was finally abolished in 1934 35

The Beginnings of a Protective Tariff

The second stage in the evolution of India's tariff policy was registered by the promulgation of the fiscal autonomy convention in 1919. In deference to the strong public opinion expressed on this subject the UK. Government decided to grant fiscal autonomy to India and directed the Secretary of State for India to avoid, as far as possible, interference in

^{*}The views expressed in this article are those of the author and not of the Fixal Commission or a y other Department of the Covernment

all cases relating to the fiscal policy of India in which the Government of India and its Legislature were in agreement His intervention, when it did take place, was to be limited to safeguarding the international obligations of the Empice or any fiscal arrangements within the Empire to which His Majesty's Government was a party This was a fundamen tal departure from the predominantly colonial attitude of earlier years, when fiscal policy was regarded as the primary concern of the U k Government, but greater changes were still to follow

In 1921, again in deference to a long standing and insis tent demand of the public in India for a revision of tariff policy, the Government of India appointed a Fiscal Commis sion to 'examine with reference to all the interests concern ed the tariff policy of the Government of India including the question of desirability of adopting the principle of Impe rial Preference and to make recommendations enquiry lasting over a year, the Commission recommended that the Government of India should adopt a policy of discriminating protection to indigenous industries and tariffs should be used as an instrument for attaining this end if the industry could establish that

- (1) it possessed natural advantages,
- (11) that without the help of protection it was not likely to develop at all or not so rapidly as was
- (111) that it would eventually be able to face world com petition without protection

ie Commission laid great emphasis on these conditions d recommended that careful discrimination should be reised in the selection of industries for protection and in degree of protection afforded so as to render the inevile hurden on the community as light as was consistent h the due development of industries The Commission > recommended that the grant of protection to an indus should be preceded by an enquiry by the Tariff Board ose functions should be inter alia to investigate into the ms of particular industries, to watch the operation of tariff and generally to advise Government and the Legis re in carrying out the policy indicated above Another ortant recommendation of the Commission was that no ort duties should be ordinarily imposed except for purely nue purposes and even then only at very low rates. On difficult issue of Imperial Preference, the Commission mmended that no general system of Imperial Preference ild be introduced but preferential duties on a limited ber of commodities might be imposed with the appro of the Legislature if the preference given in no way mished the protection required by Indian industry and preference did not involve on balance any appreciable

he Government of India accepted the main recommen ns of the Commission in a Resolution passed on the February 1923 Since then the Tariff policy of the rnment of India has been framed more or less on the recommended by the Fiscal Commission Though a anent Tariff Board was not constituted, the claims of idual industries for protection were examined by Tariff is constituted for them from time to time and protect was granted to industries on the recommendations of Tariff Boards with minor modifications if necessary few cases Government did not agree with the recom-

mendations of the Boards and protection was denied to the industries concerned Under this scheme the important industries which received protection were iron and steel cotton textiles, sugar, paper, matches and sericulture Tanfi anomalies were also corrected in a few cases on the recom mendation of the Tariff Boards Government accepted the recommendation of the Fiscal Commission that export dunes should not be used for protective purposes as in the case of hides and skins

The recommendation of the Indian Fiscal Commission of 1921 22 and the administrative action which followed in their wake between 1923 and 1939 laid the foundations of a discriminating protective system for the country and con stituted a fundamental deviation from its basic free trade policy and practice of the preceding half century The new trend was reinforced by the reorientation in British trade and tariff policy after the currency crisis of 1931 and was further aggravated by the extension of the Imperial Prefer ence system which followed the Imperial Economic Con ference at Ottawa in 1932 These influences are briefly discussed in the following section

Imperial Preference

India was not a party to any general scheme of Imperial Preference till 1932 On two occasions between 1923 and 1931, lower duties on United Kingdom goods than those levied on similar goods of foreign origin were imposed The articles which received preferences were steel and cotton In both cases the differentiation of duties was held to be justified in the interests of India

The early thirties which brought in the Great Depression saw a radical change in Britain's fiscal policy By the abnormal Importations (Customs Duties) Act, 1931, and the Horticultural Products (Emergency Customs Duties) Act, 1932, most of the articles imported into the United Kingdom were subjected to increased rates of duties with the result that the United Lingdom was in a position to reciprocate the concessions received in Empire countries As the United Kingdom was India's largest single customer it was no longer the question of what India stood to gain by joining the general scheme of Imperial Preferences but what she stood to lose by standing apart from it of India from a common preferential arrangement including the United Lingdom Dominions and the Colonies would have been a serious matter for, the more so at a time of declining trade, increasing restrictions and shrinking mar India, therefore, decided to enter into an Agreement with the United Kingdom and the United Kingdom India Agreement was signed in August 1932 at Ottawa Agreement provided for the grant of a preference of 10% on a large number of commodities imported into India from the United Lingdom in exchange for similar concessions received by her for her exports to the United Kingdom The Agreement was ratified by the Indian Legislative Assembly in November 1932, provisionally for a period of three years When the renewal of the Agreement came up before the Assembly in 1936, it voted for its termination Government, however, decided to continue the Agreement as a purely interim measure till a new agreement was arrived at between the two countries a new Indo-Brush Trade Agreement was signed on the 20th March 1939 By this agreement the number of arti eles on which India gave preference to the United Kingdom

was brought down to about twenty while the United King dom agreed to extend concessions on almost all articles which enjoyed concession as a result of the Onawa Agree ment. This agreement is still in force

War und Tariffs

The outbreak of World War II introduced some ennicly new factors into India's trade and industry. These factors are still operative and will in all probability profoundly in fluence not only the relative position of tariffs essa ess other types of positive regulation and control in the development of India's trade and industry but also people's ideas about the future structure and working of India's trade and in dustry During the War, controls over imports and exports were introduced on almost all articles and the preferential and protective tariffs lost much of their importance. The increasing shortage of goods and the requirements of clobal war strategy led to the establishment of many new indus tries in India albeit on a small scale and called for direct State assistance in increasing measure. In order to encourage these industries as early is 1940 Government assured the industrialists that industries started during the war would be given adequate protection from foreign competition, as and when necessary provided they were organised on sound lines. No such protection was of course needed during the war but Government recognised that the provision of assistance to or protection of such industries was likely to assume a measure of urgency during the period of transition from war to peace and one of their major problems during the post war years was to give form and content to their war time assurance

Post war Tariff Policy

In their first statement of Industrial Policy issued in April 1945 the Government of India laid down the following objectives —

 (i) to increase the national wealth by the maximum exploitation of country's resources,

(n) to make the country better prepared for defence

(iii) to provide a high and stable level of employment As one of the measures to achieve this end. Government decided to take positive steps to encourage and promote the rapid industrialisation of the country to the fullest extent possible. Pending the formulation of a tariff polic, appropriate to this need, Government appointed a Tariff Poard for a period of two years to investigate and recommend interim relief to war time industries. The conditions offered were briefly as follows —

(i) that the industry was established and conducted on sound business lines and

(n) (a) that having regard to the economic and natural advantages enjoyed by the industry and its actual or probable cost it was likely, within a reasonable time, to develop suffice ently to be able to earry on successfully with protection or Suite assistance

or

(b) that it was an industry to which it was desir able in the national interest to grant protection or assistance and the probable cost of such protection or assistance to the community was not excessive The Board was not to recommend protection for a period exceeding three years

The total number of cases referred to the Tanff Board was 49. Within a period of 18 months it reported on 42 cases including four cases of industries which were protected before the war and whose claims for continuance of protection the Board was asked to examine. On the basis of the Boards recommendations about 30 industries were granted protection. In November 1047, the Foard was reconstituted for another period of three years with the following functions.

- to report to Government, as and when required on the factors that lead to increase in the cost of production of Indian manufactured goods as against imported articles, and
- (ii) to advise Government as and when required on measures whereby internal production might be secured on the most economical basis

According to a Resolution issued on the 6th August 1948 the Board was also authorised to conduct enquiries as and when necessary on the effect of protective duises or other means of assistance granted and advise Government on the necessity or otherwise of modifying the protection or assistance already granted

General Agreement on Fariffs and Trade and Haynon Charter

The protectionist trend in India's tanff policy, which was halted by the war time controls and regulations and the relatively minor role conceived for tariffs in the context of these new forms of war time and post war regulating measures encountered some further opposition from the deliberations of a series of conferences on Trade and Employment held under the auspieces of the United Nations in London Geneva and Havana

In 1946, India was mixted to the Preparatory Committee of the United Nations Conference on Trade and Employment held in London to discuss the American proposals for Expansion of World Trade and Employment India took an active part in this and the subre quent session of the Conference India was also a party to the negotiations that were carried on at Geneva for the reduction of the general level of traffs. As a result of these negotiations India agreed to reduce the rainfs on more than sixty items and the margin of preference in a few cases, in exchange she received similar concessions from the other participating countries. At Havana India was a signatory to the final version of the Christer although like the other leading countries of the World she has not yet been in a position to railfy it.

Fiscal Commission, 1919, and the Fiture Outlook

It will be noticed from the foregoing paragraphs that since the Indian Fisel Commission reported in 1922, there has been no comprehensive formulation of India a tanff policy. The developments that have taken place since then have proceeded primarily on an ad hoc basis in the light of the contextual changes that the policy encountered from time to time. The War and its affermath which resulted in large scale changes in the pattern and composition of India's foreign trade and induced equally, far reaching

changes in the climate of opinion on trade and tariff matters, called for a re formulation of India's tariff policy in the context of her domestic developments of which the partition of the country was easily the most important and the changes in the world economic situation of which the prevailed ollar shortage was the most representative symptom. As early as 1945, the need for such a reorganisation of India's tariff policy was envisaged in Government's first statement of Indiatrial Policy. The second Statement of Indiatrial Policy issued in April 1948 reiterated this need, but it was not till the end of April 1949 that a Fiscal Commission was appointed to undertake this task. One of the major duties of this Commission would be to consider

- (a) the future policy which Government should adopt in regard to protection and assistance of industries and the treatment and obligations of the industries which may be protected or assisted,
- (b) the machinery required to implement such policy,
- (e) any other matter having a direct bearing on the effective implementation of this policy

Government have further directed that, in considering these issues, the Commission would be free to distinguish between short and long term aspects of the problem and also advise in the light of the country's requirements how far it would be desirable to undertake international obligations of the kind involved in the General Agreement on Tariffs and Trade or the Charter of the International Trade Organisation.

The new Fiscal Commission has been at work since June 1949 under the Chairmanship of Sir V T Krishnamachan, formerly Dewan of Baroda and Jaipur, who had a great deal to do with the economic development of the Baroda State in the thirties Unfortunately for the Commission, the general background of the country's external economic relations against which it started its work has been rapidly changing ever since. The progressive deterioration in India's balance of international payments, which had be come a source of anxiety to the Government of India as early as February 1949, and had subsequently led to the imposition of severe restrictions on imports shortly after the appointment of the Fiscal Commission had been announced had not yet been appreciably arrested. On the contrary, the gap in the country's trading account erra ers the dollar areas widened, and the position was further worsened by the rapid depletion of the Commonwealth dollar reserves, in the maintenance of which India no less than the other countries of the sterling area had a vital interest. In pur suance of the recommendations of the Commonwealth Finance Ministers' Conference held in July 1949, imports from hard currency areas were drastically cut down and the monetary ceilings laid down for imports from sterling and soft currency areas were further reduced Before these new restrictive measures could work out their full effects on the country's balance of payments, the devaluation of the rupee followed in September 1949 in the wake of the devaluation of the pound sterling, and India's external trad ing conditions were further complicated by the refusal of Pakistan to devalue her currency The set back to the balance of payment position has since been substantially corrected, but whether the improvement will be maintained in the coming months remains to be seen. In any case, the long term position as regards our international balance still remains a source of anxiety.

Devaluation is, however, likely to leave more permanent impress on the country's economy, primarily through its effect on India's trade relations with non sterling area coun tries and the consequences of this changed trade relations on its internal economy, for it is useful to remember that as many of the soft currency countries have devalued almost to the same extent as India, the values by itself have not provided with any additional incentive to increase her ex ports to sterling and soft currency areas Even in respect of hard currency areas it is too early to attempt to assess the effects of devaluation on the pattern of India's foreign There are, however, two broad generalisations which can be made Negatively, the advantages of devalu ation should not be frittered away in a rising spiral of prices but should be followed up by internal disinflationary measures Positively, devaluation may need to be followed up by deliberate and purposive control of the direction and composition of her foreign trade, not merely through nega tive measures of import and export control but perhaps also by more positive action like long term purchase agreements for primary commodities or bilateral commercial agreements providing for the purchase of specified quantities of each other's goods In order to implement effectively such post tive measures of regulation and control of foreign trade it may be further necessary to visualize-at any rate for the duration of the country's balance of payment difficultiessubstantial changes in the current agency and methods of international trading. The nature and tempo of these developments will, again, depend not merely on India's policy in these respects, but also on the policy and the prac tices of the principal countries with which she has trading relations It is impossible at this stage to predict how these changes will eventually work out but the Fiscal Commission will no doubt have to take due note of these developments and their ecrtain repercussions on the role and relative importance of tariffs as an instrument for the regulation and promotion of India's trade and industry Devaluation not only alters the relative competitive position of domestic in dustries according as they eater for the export or the domestic market, but also through its effect on import prices, alters the terms on which domestic and comparable foreign in dustries compete with one another. The supplementary measures which devaluation generally calls for may further alter the degree and pace of these competitive forces, and to that extent influence the course of domestic industrial deve While it is difficult to forecast what the findings of the Commission will be on these and related issues, it would seem to be clear that any long term formulation of India's tariff policy must attempt to secure as close a dynamic balance as possible between the progress of her industriali sation and the course of her foreign trade, consistent with the two fundamental objectives of India's industrial policy,

- (a) the optimum exploitation of her natural resources, and
- (b) the attainment of a high and stable level of employment

END of a hundred years provides a convenient predaterre for looking back and taking stock of the development of an industry and the organisers of this publication have therefore done well in choosing the present time for taking stock of the development of the textle industry. In this particular article it is intended to assess the part played by Transport in assisting the textle industry to attain its present position during the last 100 years.

Role of Transport in Industry

Generally spealing, no industrial progress is possible without the assistance of transport. Any large scale industry, in order to achieve satisfactory progress, must depend on the availability of raw materials, supply of labour, facilities for distributing its finished products and securing mechanical equipment and mills stores. It is thus obvious that such industry is dependent at every stage on transport for the availability of all these factors referred to above which ensure its progress. Even in European countries development of the various industries that have established themselves there has been coincident with the development of transport.

over 500 miles of railways were constructed. The growth of railways and roads made it possible for raw cotton to be carned over long distances and at comparatively cheap rates and this helped the development of the textile industry. It also accounts for the concentration of the textile industry in Bombay Island and round about, although there were other encouraging factors such as the humid climate of Bombay and the facilities of Bombay Harbour

World War I and After

In the early days of the textile industry, it was more spinning than weaving that was undertaken as manufacture of yarn was found to be more profitable. The yarn manufactured by the textile mills in Bombay was exported as far as China and Japan. But these markets were lost to India 3 Japan itself was making considerable industrial progress and looked to India more for the supply of cotton than of yarn. In India itself the improved communications made it possible for the textile industry, on the one hand to secure its raw materials more easily than before and on the other to cater increasingly for the home market manuely India itself by making use of the rail connections to distribute the finished products. While the development of the industry

ROLE OF TRANSPORT IN THE DEVELOPMENT OF THE TEXTILE INDUSTRY

Early Days of the Industry

The first textile mill though constructed about 1851 very near Bombay did not start working till 1854 and while a few mills sprang up round Bombay within the few following years the in dustry did not make any startling

progress for several years One of the reasons for the slow progress was that the industry was dependent on foreign sources for its raw cotton and due to the American Civil War, the price of cotton had reached heights beyond the reach of the handloom industry and the newly started mill industry At that time communications in India itself were in a poor state. There were hardly any roads to speak of and the railway construction had only just started thanks to the interest taken by Lord Dalhousie in developing com He fully appreciated the importance munications in India of communications in bringing home to the country the benefits of a single rule and fighting the famines from which the country suffered, at intervals on account of the failure of the monsoon. An experimental line was constructed near Calcutta in 1849 and the first railway line in India joining Bombay to Thana was opened up for traffic in 1854 Fairly good progress in Railway construction was achieved until 1857 when there was a set-back. The next in years however, registered a fairly rapid development and by 1870

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1. N SUKTHANKAR, ICS, Secretary Vinistry of Transport Government of India was arrested to some extent during World War I on account of the difficulty of obtaining requisite new machinery from abroad the industry experienced a period of great prosperts in the years immediately follow ing it During this period

the industry was given special freight rates and other concessions for the transport of its raw material and its finished products Thus a large number of special rates for booking cotton to the milling centres such as Bombay Ahmedabad Kanpur, Howrah Madras Combatore etc were introduced In January 1935 rates for raw cotton from Combatore and Turuppur to Bombay Ahmedabad and other neigl bouring milling centres were considerably reduced. In 1937, a rebate of 20°, on freight charges was allowed on consignments of raw cotton full pressed booked from certain stations on the old NW Railway to Kanpur A certain amount of relaxation of packing conditions was also made in favour of and genous mill packed bales of piecegoods as compared with imported piecegoods. Certain railways allowed bene fit of lower rates applicable to cotton full pressed to cotton pressed to not less than 24 lbs to a cubic foot instead of to lbs

World War II

During World War II, there was an excessive demand on Indian Railways for the movement of various categories of goods. With a view to ensure successful procedures of goods with a view to ensure successful procedures of war it became necessary to regulate movements according, to priorities. Thus at the end of 1943's a priority list, containing nine priority classes, was introduced. The maintenance of industrial production was allotted Class V priority under this list and it was in this class that the movement of raw materials to, and finished products from, tevile mills was included along with other important industries like steel and cement

System of Priorities

The priorities had to be altered with the cessation of hostilities and from 15th April 1947 sponsored movements of cotton piecegoods were given Class 1(d) priority while movement of raw materials to textile mills was placed in Class 2(a) priority This priority schedule was enacted as a result of the Railways (Transport of Goods) Act of 1947 passed by the Central Legislature in March 1947, under which priority was accorded to 99 essential items only Having regard to the gradual improvement noticed in rail transport by the end of 1947 and the beginning of 1948, the Act was amended on 25th March 1948, and a priority list consisting of three classes only was brought into force for a year with effect from the 25th March 1948 The number of stems included in this Priority Schedule was reduced from 90 to 18 so as to cover only really essential items and movement of piecegoods and raw materials to textile mills was accorded Class II Priority In spite of general improve ment in transport conditions during the year 1948, diffi culties have not completely disappeared, more particularly, on certain individual railways and the Railway (Transport of Goods) Act, 1947, as amended was extended till March 1950 While the priority list consisting of three classes is still current transport conditions have improved so much on certain railways, for example E1 and EP Railways that it was found possible to dispense with this priority classification and movement of goods traffic on these Rail ways has consequently become free In other words goods are accepted for despatch as soon as they are offered

Movement of Cotton Textiles

Reference may be made here to the Cotton Textiles (Con trol of Movement) Order, 1946 This order was promul gated as a measure of rationalisation in the cotton textile industry in order to secure maximum production and distribution of textiles at approved prices. It had conside rable repercussion on the movement of textiles The whole country was divided into 28 workable zones and movement from one end to another was prohibited without specific permission from the Textile Commissioner This was done to ensure complete stoppage of uneconomic and unreason able movements Steps were, however, taken by the Textile Commissioner to see that all the requirements of each zone were duly provided for Permission was given to railway passengers to carry, only upto certain limits, cloth and jarn from one place to another as part of personal luggage. There were no restrictions inside the zone, however, on the movement of cloth and yarn by road air and sea or inland navigation or by goods train or as a railway parcel No.

such restrictions, were imposed on the movement, inside or outside a zone, of handloom cloth and sarn, imported deal, and ready made garments, which could therefore be mored freely without any permits. This overall control by the Textile Commissioner greatly assisted in the rutionalised distribution of cloth to consuming centers in the country and ensured adequate provision to the industry of all its requirements of mill stores, etc. Cloth was given the same preferential treatment as foodgrains in so far as its movement was freed from operating restrictions wherever possible. Also when transport conditions proved specially difficult the rulway authorities allotted ad how wagon quotas or even arranged for special trains for the movement of textiles to specified areas and destinations, in order to meet the demands of high priority traffic in textiles

Present Working

The political changes brought about in the country in August 1947 led to a further pressing demand in transport and therefore of tightening up of movement control and stricter rationing of available transport among competing high priority demands. In November 1948, the Central Government concluded that instead of rationing insufficient transport supply among all the competing industries certain key industries should be selected as of special importance and preferential treatment given to them to provide cent per cent transport for their needs The result would be that other industries would get proportionately less transport than if it was rationed out among all industries. It was decided that textile cement and steel industries should be considered as three such basic national industries, requiring cent per cent fulfilment of the transport needs The targets of transport requirements for each of these industries are laid down and phased movement programmes for each quarter are screened and approved in advance, by the Standing Committee of the Central Board of Transport in consulta tion with the representatives of the industries concerned and the railways. The targets are fixed on a workable and realistic basis after giving due weight to all the relevant factors such as the transport position at the moment, the rate of production and quantities of output to be distributed to the consuming areas. The actual implementation of this programme is carefully watched by the Committee which meets every formight. This scheme was brought into operation early last year and the results so far achieved show that the railways have implemented the undertaking in full In fact on several occasions the transport provision has been in excess of requirements and the industry concerned has, at times, been unable to avail itself of the full facilities pro

The following statistics showing the actual movement of textiles in each quarter of 1949 will be found interesting

Movement of Textiles in 1949

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Road Transport

After describing the part played by the railways in helping the development of the textile industry, it will be opportune to refer to the part played by road trampport in respect of the textile industry. Before World War I it was only in large cities that a few mechanically propelled whicles were used in public transport. Ponderous solid tyred steam-driven lorries took cotton from the railway goods depots to the mills in Bombay and later took finished cotton goods to the Railway station or to the Docks for export. This was prior to the advent of motor transport. It was after World. War I that motor transport made great strides and increased use began to be made of motor vehicles for the purpose of public transport. Some idea of the increase in their numbers over recent years could be had from the following figures.

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	Indian Union	
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1917 48	51 R 2	
1948 (1)	52 267	
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Nationalisation of Road Transport

The expanding network of highways and feeder roads nade it possible for cotton to be inoved from the fields to he ginning centres and from there to the mills spread all wer the country The movement of textile goods from nills to trading centres and even to the distant consuming narkets in towns and villages was facilitated by improve nent of road transport A reference may be made here to ertain significant developments in connection with roads ind road transport which augur well for its future Provincial Governments are now following a policy of nationalisation of road transport Thus, Bombay Govern nent has recently established a Board for promoting an efficient, adequate and properly co-ordinated system of road ransport in the Province for the movement of passengers and goods The State Road Transport Corporation as it is called, is expected to serve in addition to Bombay City, another 27 districts It has been given certain wide powers to prepare and execute such schemes as are likely to rational lise and co-ordinate any road transport service or ancillary service in any part of the Province

Development of Roads

As regards roads themselves there has been a complete reonentation of Government outlook. In the earlier years of the aoth century, roads had cone to be looked upon is a subject of local interest only. Bit to be handled by municipal

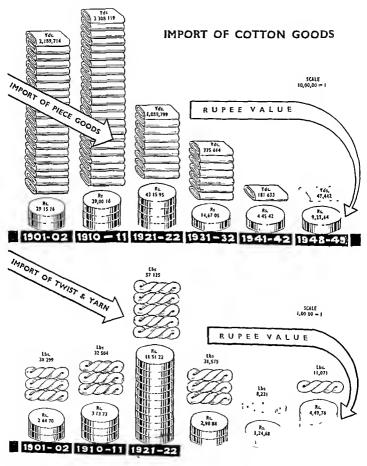
lites district and local boards. It was in 1927, that the Indian Road Development Committee appointed by the Gowerment of India under the Chairminship of Dr. (then Mr.) M. R. Jayakar, Bar at Law, came to the conclusion that it was beyond the financial capacity of Provincial Governments to ensure development of roads on proper lines and that they really should be looked upon as of national interest and, therefore, a proper charge on Central Revenues. One of the Committee's most important recommendations was to suggest the establishment of annual grants to be credited to a separate road development account so that unexpended balances should not lapse at the end of the financial year. The Conference of Engineers at Nagpur in 1943 suggested sound lines for the formulation of Government policy in respect of roads.

Antional Highways

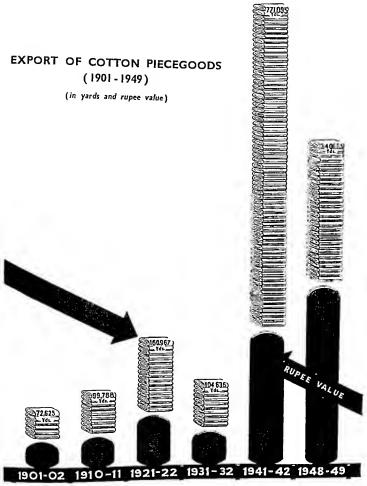
As a result of these recommendations the Central Gov. ernment have since April 1947, assumed provisionally and subject to certain conditions, complete financial liability in respect of both construction and maintenance of reads which should be accepted as part of a national system of Highways Certain constitutional changes in regard to roads are worthy According to the Constitution of India the Union List includes Highways declared by or under laws made by Parliament to be National Highways Government will thus be called upon under the new Con stitution to play an increasingly important part in relation to those Highways which will be declared by or under law made by Parliament to be National Highways While the financial difficulties in the recent years have caused a set back to the construction and progress of roads, it is to be hoped that on return of prosperity, both the Central and the Provincial Governments will embark on programmes of roads within their respective spheres of operations which will ensure a balanced development of communications These will serve the ever increasing transport needs of the country and will not only ensure general industrial progress but what is more important ensure rural prosperity improved communications will not only benefit the textile industry generally but give an impetus to the use of indigenous cotton

The Future

It is gratifying to note that in 1948 49 mill consumption of indigenous cotton recording a moderate improvement amounted to 3 123 915 bales as against 2 863,450 bales in the previous season. In terms of percentage, the rise in consumption works out to 16%. At present, the total mill production of cloth amounts to approximately 4 000 million yields. This, together with the landleom production which amounts to approximately 2 000 million yards means a prosision of approximately 15 yards per person per annum. In the prosperous conditions which free India must secure in the years to come, it should be possible to provide much larger yardage of cloth than this for each person. No popular Government in these days can forket that cheap food cheap cloth and cleaps shelter are the three tests which the public would apply to judge its efficiency and success. It is obvious that all forms of transport and particularly, and and road transport must plax an emment part in enabling the Union and the State Governments of the future to secure these chejecties.



Page Thirty at



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A Half-Century of Textile Exports

P ARADOXICAL though it may seem Indias export trade in cotton textiles is far older than her textile industry. Long before the industry, as we inderstand the term today, came to be established on Indian oil cloth produced by shilled Indian weavers working on primitive looms had a reputation in the world outside. The new technique of power production which enabled iroregin cloth to find an extensive market in India dealt a severe blow to Indias eviport trade in textiles. Fortunately the development of the Indian textile industry not only made India self sufficient in cloth but it also enabled her to regim a position of some importance in the export trade in textiles as the statistics of our textile exports over the last half can tury show.

Exports at the turn of the Century

In the year 1900.01, India exported 69.3 million yards of cotton piecegoods by sea to various countries of which 18 million yards went to East African ports another 18 million yards to the Strait Settlements 9 million yards to Cevlon and 8 million yards to Aden Relatively small quantities went to Turkey, Persia China and U.K. It is significant that the most important markets were on the East Coist of Africa where a good number of Indians had migrated Aden and the Strait Settlements also took relatively large quantities no doubt because their geograph cal situation made them peculiarly suitable for entrepot trading with neighbouring lands Ceylon as our nearest neighbour also took a substantial quantity

Between Two World Wars

Till the outbreak of World War I the level of seaborne exports was throughout below 100 million yards per annum a figure which was very nearly attained in 1910 I1 The Great War gave the first big stimulus to Indian tertile exports which reached the then peak figure of 263 million yards in 1916-17 Although this figure was never reached again before World War II began exports between 1915 16 and 1929 30 were throughout more than 100 million vards a year and as a rule nearer 200 million vards than 100 million yards. In the thirties the volume of seaborne exports declined again to well below 100 million yards per This was not very surprising because in those years of depression the level of textile exports for the whole world had declined by 30% in comparison with 1928 By 1936-37, however, Indian exports were once again on the increase and in 1937 58 we exported 241 million yards which was 60% more than in 1928 even though the world index compared with 1928 stood at about 80

Thus on the eve of World War II our exports of piece goods had doubled in comparison with what we exported prior to World War I The number of countries to which we exported cloth had also increased enormously and un cluded the UK and US A on the one hand and Australia on the other. The main markets however, continued to be on the Continents of Asia and Africa. Burma with % million yards in 1938 39 was easily our most important

buyer but it must be remembered that only a few sears be fore Burma was a part of our internal market. Ceylon and the Strain Settlements with B and 17 million sards respectively ranked next in importance while most of the other countries bought quantities below 3 million yards early

An All time Record

With the fresh outbreak of hostilities in Europe with Germany and later Japan becoming enemy countries with British industries engaged increasingly in munitions production the Indian textile industry once again had to supply cloth in larger quantities to more countries than ever before In 1942 over 976 million yards of cloth were shipped from the shores of India - an all time record so far Such a level of exports could obviously not be sus tained for any length of time. The Indian industry did not have any large surplus eapacity over and above the needs of internal consumption. The country's balance of payments position also was exceedingly good. While India continued to export cloth in the following years in spite of internal shortages it was more in a spirit of co-operative pooling of resources between countries facing a common crisis than for building up new long term markets. The level of exports was restricted by quotas and owing to a number of other reasons as well exports by 1947 decline l to 2795 million yards

1949 - Export Drive

An export drive in cotton piecegoods was really laurched only in 1949. The quota restrictions were removed The export duty was abolished. Price control over exports to all countries was re imposed. Exports began to increase almost immediately and riginist the average monthly export of 27 million yards by sea in the first half of 1941 the figures of exports between July and Septemb r 1949 were 36 million yards a month on the average.

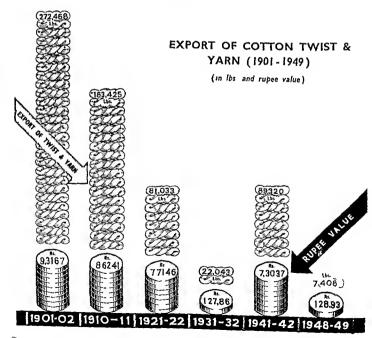
Effects of Devaluation

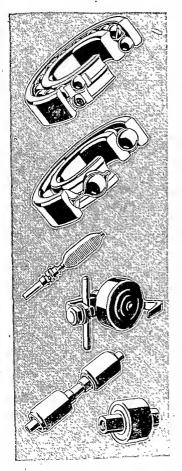
Then came devaluation. The alteration in the rupse dollar ratio in September 1949 enabled Indian textiles to be sold at prices substantially lower thin those quoted ly Japan even after the floor prices in that country had been removed. More fundamental however, was the fact that after devaluation Indian cotton became remarkable cheaper than any other cotton in the world. As a result Indian textiles became decidedly cheaper than supplies from may other country and by December 1949 the volume of monthly export was over 85 million yards. The price control one exports of piecegoods has since been removed and the monthly volume of exports is rising still.

L K JIIN ICS,
Chief Controller of Exports Government of India

Present day Problems

Behind this somewhat simple story which statistics tell he some fundamental problems which have not to be faced. The partition of the country in 1947 has hit the textile industry in two ways. The large cotton crop grown in the areas no v included in Pakistan is no longer wal able to the Indian industry free from quotas duties aid other restrictions Simultaneously a large portion of what was our internal market for textiles has become a foreign market where Indian cloth has in many cases to pay a higher duty than textiles from certain other countries. For the textile industry to keep up a fair level of production it is now necessary that India should import large quantities of cotton from all over the world Moreover our balance of trade position is far from satisfactory and if instead of being a net exporter of cotton in substantial quantities as we were before the war we are to import cotton in lakhs of bales as we do today we have got to find new methods of curning the necessary foreign exchange. By stepping up our exports of pieces, oods the foreign exchange postion has been eased. What is equally important the in dustry has been able to ensure a market for its product to compensate for the decline in internal consumption due to partition. Satisfactory though the position thus seems to lay the problem is by no incurs solved. The relative cheapness of Indian cotton compared with the cotton produced in other countries will not last for an indefinite period. In the last analysis the export potential of the country depends on greater production and more efficient production Only by converting cotton into cloth more economically than others can our industry hope to compete effectively in the markets of the world. That it should be able to do so is a matter of as much concern to the economy of the nation as it is to the industry itself. For the fulfil ment of this task it is essential that the cultivator must grow more cotton that the mills must produce more and better and cheaper cloth, and that every Indian should be prea red if necessary to use a little less cloth than he otherwise i Inor





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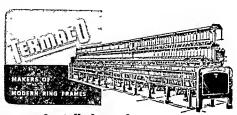


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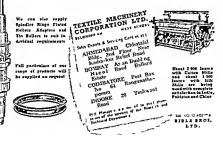
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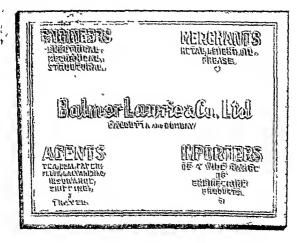
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EDGAR HAN



The Financial Structure of the Cotton Textile Industry

By P. A. SESHAN, M A., Joint Editor, "Indian Finance"

IT is a fortunate development of the war period that the Textile Industry has been able to emerge in a greatly strengthened financial condition Even though the Cotton Textile Industry is the largest National Industry and has accounted for an outlay of over Rs 50 crores in terms of paid up capital-not to speak of the continuous deployment of reserves in the case of the relatively prosperous units and the progressive attitude adopted by particular groupsthe rate of earnings in the case of the marginal or the slightly above marginal units had not been such as to provide fully for the charges on account of depreciation or obsolescence With the result, the problem of the various managements in the thirties was one of finding the neces sary money in order to keep the machinery in a proper state of repair and to maintain progress on the technical front Even now it eannot be said that technical efficiency is all that could be desired and only the scarcity conditions in the country and the opportunities to exploit a situation have enabled many to earn large profits

It need not be said that the average age of machinery em ployed in the various factories is pretty old, and with the kill to-death working in the war years, it has not been possible to maintain production at the peak levels of 1913-4f. It is true, how ever, that the opportunities afforded to use to maximum extent avuilable capacity has enabled the Indus tralists to more than offset the early losses and minimums the disadvantages of over-capitalisation in particular cases

It is, therefore, necessary to go into the question whether hadustry is in a position to cater to the requirements of the country in full and adopt the necessary changes in the methods of production, such that at least the more efficient units could go 'finer' and the changing tastes of consumers could be properly taken into consideration. On paper is should be said that the resources available at the disposal of many of the units in the Industry are ample and that, even allowing for the increase in the cost of machinery, the necessary replacements and renewals could be effected without being obliged to raise additional capital or equitables the structure of industry. The only question that has to be decided is in what way the necessary adjustments could be effected and a verage efficiency raised.

In so far as the initiative will be left to the various producers and there is no desire to interfere with the recorder ing of the industrial structure, it should be said that not much attention has been paid uptil now to the exact manner in which the efficiency of the industry should be increased or replacements and renewals should be effected Unfortunately, it is difficult to formulate any definite plans in this regard. But in view of the failure of the new mints and the threat to the existing level of production by the

decrease in the average efficiency, it will be worthwhile to go into the question whether the available resources could be utsheed effectively and the immediate necessaries of mills in particular areas inquired into

Except for the bigger units, which have been rather keen on adding to the capacity and diversifying the lines of production, the general tendency has naturally been to wait for favourable developments and to put to effective use avail able resources It is admitted that the financial position of many units is vastly different from what it was before the war period. But for the enlarged resources even the increased requirements in regard to working capital alone would have accounted for the payment of interest charges. which might usefully be utilised in increasing the dividends to shareholders The improvement in the financial position in particular units has been necessarily uniform in pattern though it must be said that the bigger units stood to gain to a greater extent It is true that the Exeess Profits Tax operated rather harshly in the case of this industry. But the profits were truly excessive" in respect of the Indian Textile Industry and for many years the Textile mills were the tax gatherers for the Government Indeed, it must be said that the greater proportion of the proceeds from the Excess Profits Tax was mainly from the Textile Industry and it is not known what exactly would be the size of profits earned by the trade, viz wholesale dealers and retailers It is common knowledge that black marketing was (or is) rampant and that, in the absence of rationing in the earlier years and checks in the methods of distribution it was open to any one to make large profits. In recent years, however, mills have not been so advantageously placed though the trade has continued to flourish. Only in the last year, black marketing has been on a much reduced scale thanks to the reduction of the purchasing power of the average consumer and the large imports from foreign countries

The total profits made by the industry in the peak year might be easily placed at over Rs 400 crores and the additions to reserves in the form of compulsory EPT deposits and allocations to feutors to could be easily Rs 50 crores. An attempt has been made later in this article to judge, as far as possible, the extent of increase in net liquid assets of a number of companies. Instances are also given of units which have developed strength over a period and which by writtee of a cautious policy in regard to the payment of dividends, have added colosial sums to their reserves. What exactly these units propose to do with the sums at their dispocal it difficult to be said but it can be pointed out without hesitation that the minagements could be trusted to use effectively funds at their dispocal and the patience of the shareholders will be amply rewarded in later years.

An attempt has been made to analyse the profits of a group of balance sheets that were published in recent years While it has not been possible to present on a comparable basis, figures for the same sets of balance sheets for the years 1942 to 1949, it will nevertheless be possible to formulate ideas which will be in keeping with the conclusions reached above and which will give an idea of the prosperity enjoyed by the Industry till very recently. The figures for the years 1942-49 relate to the accounts that were published in the period under reference. As such it might be permissible to assume that the general trend of profits will most probably relate to the previous year or upto 6 months of the parts cular years in question. It is not possible to say clearly to which period the profits exactly relate as in many cases the accounts are closed annually to December or June and many companies have their half yearly closing of accounts either in June or December or March or September as the case may be But it has to be emphasized that for a three year period the basis of comparison is strict and the conclusions derived from an analysis of the figures will be strictly valid. In the 3 years 1949, 1948 and 1947, a more detailed analysis is available, the provision for taxation depreciation allocation to funds and ordinary dividends being given separately. In the earlier years, taxation is given separately but allocations to depreciation and funds have been given under one head while dividends included payments on ordinary, preference and deferred shares

It will be seen from the figures given below that the period of prosperty has been almost unbroken, though un even and that the exchequer has been the beneficary. The peak of profits was touched in 1944-45 and a faurly lingh level of earnings was maintained in 1945-46. Thereafter, a decline was noticeable until 1947-48. But thanks to decontrol there was again a jump in profits in 1954-49 to very nearly the level of 1945-46. The rise in profits started in 1942-43. Forto to the war period a stated previously, profits have been on an even scale and there was nothing spectacular even in the case of the most efficient units.

Sirty mine account published in 1949 revealed an aggregate point of Rs 2147 croses against Rs 1197 crores published in 1948 and Rs 1469 crores in 1947. The priori ison for textation was Rs 9.88 crores against Rs 528 crores and Rs 727 crores previously while the charge on account of depreciation was Rs 212 crores against Rs 161 crores and Rs 105 crores respectively. Allocations to funds were on a generous seale, being as much as Rs 582 crores against Rs 217 crores and Rs 1054 crores in the 2 previous years. The distribution of dividends on ordinary shares was slightly higher at Rs 286 crores against Rs 262 crores and

Re 276 erores and it should be said that the bonus issue of shares fully paid up and freely issued to shareholders in getting them additional income. The limitations regarding the psysient of dividends were mainly responsible for the absence of a proportionate increase in the dividend psysients.

An analysis of the paid up capital shows that there was un increase in ordinary preference and deferred capital to Rs 26 89 crores in 1949 from Rs 21.34 crores and Rs 1743 crores in the 7 previous years. The increase in paid up capital is rather significant and it must be said that it was mainly due to the issue of bonus shares by a number of companies. Otherwise, there was no need for raising additional capital. That such bonus distributions were possible will be seen from the fact that allocations to reserves in the 3 years under reference alone were Rs 1091 crores what time the increase in paid up capital was bout Rs 946 crores Obviously the decision made by the Directors of the various companies to increase the paid up capital was influenced by the substantial additions to receives and it is rather significant to note that the consol lated balance sheet does not show any appreciable change it the reserves ut the coul of 134) from the level of 1945 e on after the utilization of a large portion of the accumulated reserves for purposes of capitalisation and issue of new ordinary shares fully parl up to existing shareholders. Naturally, it will not be correct to form an idea of the basis of earnings on ordinary shares after the bonus issues though the figures can nevertheless be given. In 1947, the disposable profit after providing for taxation and depreciation, on the basis of disclosed figures was as much as 32.9 per cent of ordi nary shares while in 1948 it had declined to 12.3 per cent, partly on account of the lower level of earnings and partly on account of the increased paid up capital. In 1949, earn ings were substantially higher but the percentage expressed per ordinary share was only 158 per cent owing to the fact that the capital at charge was 50 per cent higher than the figure published in 1947 Though earnings were 50 per cent higher, the period of high profits and high taxes was naturally 1944 45 But even in that year it was possible for the industry to put by over Rs 67 crores even though it must be said that the best experience was in respect of 1949 when the net disposable profits were the highest on record, the burden of taxation being substantially lower In the case of 69 accounts which reported a profit of Rs 21 47 crores the taxation provision was Rs 9.81 crores In 1945, 83 accounts revealed an aggregate profit of Rs 3647 crores while tax provision was as much as Rs 20 69 crores

TABLE I
Trend of Profits in War and Post war Years,

_	-	Net Profit.	Taxation,	Depreciation.	Funds	Ordinary Dividend,	Carry Forward
1947 1943 1944 1945 1946 1947 1917 1919	(59) (59) (59) (83) (43) (63) (69) (69)	3 98,09 201 7 94 54 659 112° 6 5 677 36 47 98 872 27 95 61 977 17 99,54 553 14 69 96,679 11 97 38 DV6 21 46 61 334	1 47 43 480 4 64 44 996 3 07 17 915 26 69 32 033 18 59 89 806 8 40 27 337 7 % 57,537 5 % 15 474 9 81,34 744	2 19 5 2 1 6 6 70, 5 12 0	5 707	80 66 796 91 63 430 1 41 13 325 3 7 57 334 7 59 36 997 3 41 04 256 2 75 50 303 2 61 99 111 2 85 20 164	29 98,535 23 44 821 19 32 094 1 05 34 575 1,01 56 234 1 05,50 913 74 24 688 70 13 224 1 3 74 000

In the following paragraphs, the profits of two prominent industrial establishments in the past 13 years have been analysed. The analysis aims at a comparison of the earn mos in the immediate pre war period and in the war period It is not possible to have complete figures in respect of the earnings in the immediate pre war period but the conelusions reached are valid. It is clearly borne out that the heavy taxation in war years with the levy of the Excess Profits Tax, prevented any large distribution of profits But the need for depositing compulsorily a certain portion of the profits and the eligibility for securing large refunds greatly strengthened the financial position of nearly each and every unit in the Industry. An effort has been made later in this article to show that big and small mills, efficient and mefficient mills, have benefited by the conditions that existed in the trade in the war period and that the accession of strength is inversely proportional to the level of earnings in the basic period. It can however be presumed that in the conditions that existed in the war period, it was possible for nearly every unit to earn large profits and that the advantages on account of relative efficiency did not affect much the rate of earnings, especially as the intention of the Textile Commissioner was to maximise production and there was no control over prices for a particular period and in the earlier stages prices were revised periodically

When a consideration of the working of the Textile Industry is taken up, the names that occur to every mind a first thought are those of Rombay Dyeng, Kolunoor, Buckingham Carnatic, Madura Mills, etc. An attempt has been made in the following paragraphs to study the profits of Bombay Dyeing and Kolunoor Mills and confirm the conclusions reached earlier.

The Bombay Dyeing and Manufacturing Company Limited earned a total profit of over Rs 1121 errors in the prices 1926-1947 both inclusive. The figures relating to profits in the years 1936-39 do not include the provision for taxation but it should be said that taxation was not heavy in these years and out of the net profit of Rs 816 lakhs for 1936-39 (both the years inclusive) not more than Rs 30 lakhs could have been paul as taxes. It will there force, be correct to assume that the aggregate profits in the

12 year period under consideration was round about Rs 11.5 erores In the period of high profits, taxation has been rather heavy, the Excess Profits Tax being first levied in 1941-42 Of the aggregate profit of Rs 11.5 crores, the provision for taxation alone amounts to Rs 74 erores the Inghest profits and highest taxes being made out of the earnings for 1943 Obviously, the provision in the case of Pombay Dyeing includes to a certain extent the deposits coropulsorily payable to the Government and to that extent it is not possible to say what exactly is the net provision for taxation. But an analysis of the balance sheets for the years under reference will show the growth in the balance sheet and the net addition to assets Even on the assump tion that Rs 74 crores was provided only for taxation purposes, the net earnings were Rs 381 crores of which Rs 203 crores related to 1943-47 Rs 964 lakhs to 1940 42 and Rs 816 lakhs to 1936-39 It will be readily seen that in one particular year alone it was possible to earn very nearly the whole of the profits for 1936-39 It is rather curious to note that, in the period of high profits, the provision for depreciation was not very heavy, presumably because in the earlier years, the plant has been depreciated heavily and with the large sums available in the various reserves, it was not considered necessary to allocate huge sums. As such out of the net profit of Rs. 381 erores after taxation, the provision for depreciation was Rs 76.32 lakhs as much as Rs 4096 laklis being provided in the years 1936-39 The shareholder was obviously benefited though the benefit was not in any way commensurate with the increase in earnings. Allocations to funds were compulsory in many cases and voluntary in others. Nevertheless it should be said that the return on investments in 1943-47 was very satisfactory and that on the paid up capital of Rs 6275 lakhs before the reserves were eapitalised and the bonus shares were issued in 1947, the original shareholder had more than recovered his investment. The aggregate amount paid by way of dividends was Rs 1.29 erores on which only Rs 6.25 lakhs was paid in 1936 39 and the maximum dividend was distributed in 1942 and 1943. The average dividend for 1936-39 was only 131 per cent divi dends of 10 per cent each being paid in respect of 1936 37 20 per cent in 1938 and 14 per cent in 1939

TABLE II

BOMBAY DYEING AND MANUFACTURING COMPANY LTD

Analysis of Earnings for 1936-48

Year ended Decembe	d pe for taxahou and depreciation.	Тахаі оп	Depreciation	Allocations to funds	D vidend Amount	Dry dends % Ordinary
1927 1938 1939 1940 1941 1942 1913 1944	16.54 366* 18.51 113* 27.53,245* 19.99 070* 12.10 700* 16.145 845 31.26 904 2,30,84 641 159.90 715 85.25 168 41.33 675	34 °5 000 1 10 00 000 2 79 00 000 1 84 00 000 1 14 50 000 18 00 000 18 00 000	9 77,573 10 51 662 10 43 184 10,24,949 6 66 883 4 85 213 4 40 035 2 99 276 3 70 926 3 90 369 3 90 379	1 75 000 4 50 000 9 98 800 20 13 278 47 50 000 25 00 000 14 73 729 5 46 205 30 00 000	8 27 450 6 °7 450 12 54 940 8 73 430 7,52 940 15 05 880 25 09 800 25 09 800 18 9 355 18 32 356 16 31 370 15 05 880	10 10 20 14 12 24 40 40 50 50 6 12 13 1/5

After taxat on

In the same period Kohinoor Mills also made a good showing and the residual profits worked out very much in the same ratio to total profits before taxation. In the period 1936-47, the net profit, before taxation, amounted to 88 6.99 crores out of which Rs 4.20 crores had to be given away to the State and only Rs 2.7 crores remained for the benefit of the shareholder, in 1943-47, the bulk of the profits was made, being Rs 5.16 crores against Rs 1.94 crores for 1940-42 and Rs 33.69 lakhs for 1936-39. The net profits,

after tavation were Rs 172 crores, Rs 6358 lakhs and Rs 3369 lakhs respectively. After paying dividends to the extent of Rs 1927 crores on ordinary slares, the addition to funds was Rs 194 lakhs and the provision for dependent on Rs 7968 lakhs. The paid up capital of the Company was only Rs 45 lakhs in 1945. The rate of earnings in one particular year was nearly 100 per cent on capital after providing for tavation.

TABLE III
KOHINOOR MILLS CO, LTD
Analysis of Earnings for 1936-48

	37 . 33 . 4		- switnings for 15	30-18		
Year ended December	Net Profit before providing for texat on and deprecial on	Taxation.	Depreciation.	Allocations to funde	Dividend Amount	Dividends
1936 1637 1938 1939 1941 1941 1942 1943 1945 1945 1945 1945 1945 1947 1948	6 15 1378 8 17 2 2025 11 12 751 = 11 12 751 = 8 23 040* 9 92 670* 43 92 723 98 46 836 17 46 90 37 10 16 4 600 6 7 44 528 3 3 12 457	21 66 490 64 11 576 130 60 000 21 83 5 0 24 83 5 40 6 40 000 50 60 000	3 45 264 5 23 339 5 79 311 4 14 414 4 47 170 8 699 6 7 74 717 7 11 717 7 53 305 6 3 922 8 91 864 8 1 1 101 11 6 2 1 6	70 000 33 000 2 00 000 1 4 55 000 1 4 50 000 1 4 50 000 0 50 000 0 50 000 4 27 500	2 € 0 0 3n 2 € 0 001 2 ₹ 0 001 3 ₹ ₹ 11 4 90 000 4 4 36₹ 8 10 000 12 00 000 12 20 000 12 20 000 12 25 000 10 12 5 000 10 12 5 000 10 12 5 00	Ordinary 10 12 15 18 18 97 40 40 28 28 20 10 1/8†

After the issue of bonus shares

The accession of strength would have been even more pronounced it taxation had not been heavy and the exchequer accounted for nearly 80 per cent of total earnings. But it is abundantly clear that the rate of earnings was run ming at very high levels and that even the residual profits have been such as to be reflected in substantially larger assets.

It is not clear, however, whether the resources available at the disposal of the established units will be fully sufficient for replacement purposes and at the same time leave enough for meeting the requirements for day to-day working Perhaps, a planned programme of replacement would en able an effective use of available funds and it might be found at the end that the rupees which were accumulated in the period of inflationary conditions could be made to fetch good value ultimately The considerations in this regard might have been responsible for the slow progress in certain directions and not many units have been anxious to utilise fully available funds. In the case of such units as were able to effect substantial additions in the period of low prices and in the case of such units which came into being in the thirties, it could be said that the addition to funds is really worthwhile and that the shareholders are n a position to derive complete benefit from accumulated

The general strength of the cotton textile industry on the financial front will be evident from a cross section of the balance sheets of 24 companies analysed over a 3 year section, i.e. between 1945 and 1948 and an analysis of the balance sheets of two leading units over a decade and a ail

The consolidated balance sheet of 24 companies which ublished their figures in 1949, will show that there has

been effort to reduce as far as possible not indebtedness and that except in rare cases the squeeze has not been felt as in Britania and other countries. No large expenditure has so far been made in replacements and renewals of machinery and satable funds have been very usefully employed to avoid interest charges which would otherwise have been incurred. It is true that the recent rise in prices for raw materials and the need to keep larger stocks have resulted disposable and EPT deposits can be had when there is need, there is resiliency in the financial structure. It may tery well be that, at the time large scale orders are placed for mackinery and store and spares, there will not be any priced cotton and finished goods.

The balance sheet for the same companies published in 1948 revealed an increase in ordinary capital by Rs 1.37 erores to Rs 9.24 crores and preference capital by Rs 45 lakhs to Rs 252 crores The deferred capital was unchanged which there was mercase in the loan capital to Rs 30 lakhs from Rs 565 lakhs Obvously, the increase no ordinary capital was due to the issue of bonus shares, there being no need for raising additional capital at any time. Even after the capitalisation of reserves amounting

to Rs 184 crores, reserve funds rose by Rs 186 crores while current habilities deelined by as much as Rs 6 crores from Rs 1446 crores Undistributed profits were lower at Rs 416 lakhs against Rs 2398 lakhs. The contraction in the halance sheet total was thus munity due to a reduction in current liabilities and it will be readily seen that appreciable benefits were derived by the accumulation of reserves

On the assets side, replacements and renewals and additions to machiners led to an increase in capital outlay to Rs 2652 crores from Rs 234 crores according to the balance sheet published in 1945 but this increase in capital outlay did not mean any hlocking of available funds as the provisions on account of depreciation were enough for this purpose, there being a rise in the depreciation allowances to Rs 1895 crores from Rs 1546 crores. As a result, the net block was actually lower at Rs 758 crores against Rs 794 crores. Stores and spries rose to Rs 315 crores from Rs 226 crores while outstandings were not very much changed at Rs 496 crores (Rs 485 crores). There was actually a decline in investments to Rs 468 crores from Rs 544 crores while the repayment of EPT deposits accounted for a return of Rs 21 crores the balance in this account being Rs 227 crores against Rs 438 crores. With an increase in stocks and stores cash balances declined to Rs 278 crores from Rs 462 crores Stores were as much as Rs 153 crores against Rs 1345 crores. Net liquid assets were higher at Rs 1864 crores against Rs 1454 crores

Even if it were necessary to repay the preference and debenture capital in full, the residual sum available for distribution on ordinary and deferred shareholders was imple in many cases being more than twice the paid up sime it is absorbeivant to remember in this connection that shareholders have been benefited by the capitalisation of reserves in many cases and the ordinary capital is in some instances more than double the previous figures.

TABLE IV

Consolidated Balance Sheet of 24 Companies
(000 s omitted)

	LIABILITIFS				ASSETS		
		1313	101			19,5	1945
Cup tal		Ra.	Rs.			Re	Rs
Ord cary Preference Deferred Debontures Pererve funds Debts Carry Forward	 -	9 21 46 2 5° 28 50 00 30 00 13 5° 97 14 40 14 4 16	7 ×7 16 2 07 65 50 00 6 61 11 73 61 10 43 33 23 93	Cress Block Depreciation Vet Block Storee Outstanding Investments E P T Deposit Gath Balances Stocks		26 52 15 18 94 55 7 57 60 3 15 30 4 90 13 4 93 42 2 97 01 3 15 25 59	23 40 °1 15 45 03 7 94 18 2 6 33 4 85 2 7 6 43 85 4 37 56 4 6 7 26 13 44 89
	Total Be	40 67 91	129131		Total Ra	46 57,21	429434

It will be clear from the foregoing that the financial structure of the Cotton Textile Industry has improved tonsiderably in the past decade and that, nearly all the important units are in a position to provide fully the funds needed for renewals and replacements The argument has been put forward that on the basis of replacements costs it will not be possible to renew machinery wherever neces sary But if it is remembered that the initial and double depreciation allowances in respect of machinery will be available for a fairly long period and that the textile units can choose their plans which will bring the greatest benefit, the need is for a earefully formulated policy of development and not a plan for meeting the expenditure under various heads. It might, however, he said that the avail ability of rupee funds at the disposal of the cotton textile industry does not necessarily bring in the requisite foreign exchange But the problem is one for consideration by the

Government and not by the industry and it cannot be said at any moment that the expansion plans have been held up merely because of this difficulty. The main reason for the delay in effecting additions to plant and machinery has been due to the difficulty in obtaining the necessary equip ment. There has also been a desire to make the fullest use of available funds and, as has been stated earlier in this article and explained more fully in the succeeding article, the anxiety is to bring about such a change in the general structure of the industry which will enable the various units to cater to the changing and changed tastes of the consumers and at the same time retain the health of the financial structure. The efficient units are certainly capable of looking after their requirements. Only, if in their case a planned policy could be followed and exten sions speeded up, the future of the cotton textile industry would be assured

POST-PARTITION PATTERN OF DEVELOPMENT OF THE INDUSTRY

By P. A. SESHAN

T the time the Post War Planning Committee (Tex A tiles) submitted its report to the Government of India, there was no suggestion that the country would be politi cally divided into two parts and that it would be necessare to revise the plans for development of the Indian Textile Industry It is common knowledge that the consumption of eloth and yarn has been progressively on the increase in the past decade and that during the war period, with the large demand on the industry from the Defence Services, an acute shortage was experienced in respect of the requirements of the ordinary citizen Even now, with the considerable reduction in the requirements of the Defence Services, it is not possible to ensure a liberal supply to every entiren and in particular areas, and it has been found necessary to continue restrictions regarding sale of cloth and varn in certain areas. There is no doubt that the reduction of the offtake on account of Pakistan and liberal imports from Britain and other countries have considerably eased the supply position But the problem of development of the industry, both from the point of view of the established units and the promotion of new units, has to be actively considered and definite decisions taken. The Post War Planning Committee was of the view that the further development of the industry could best be carried out in the deficit areas as it was strongly felt that consumer goods industries could be actively encouraged in the areas in which there was a deficit and there was a ready market and the necessary facilities could be made available. The need for regional development was of course the main consideration though it was recognised that the required skilled labour might not be available in particular places and that the concentration of the industry in specific areas would continue to be a feature for some time

From a glance at the figures given opposite, it will at once be seen that between Bombay and Ahmeelabad a good por tion of the total production is secured and that all the other zones are defeit in their requirements. The disason of the various areas spondlewise will show that as on January list, 1945, 594 million spindles were in respect of the Dombay surplus area out of a total of nearly 10.3 million

spindles. The next biggest concentration was in the south zone with 1.96 million spindles. UP came third with 773 lakin spindles and Bengal fourth with 418 lakin spindles. The next biggest concentration was in the court zone with 196 million spindles. UP came third with 773 lakins spindles and Bengal fourth with 418 lakin spindles.

TABLE I Spindles installed in India on 1st January 1945

nstalled es o uary 1943
941,162
2 216
234 023
773 285
25 040
450 924
374,030
955 538
519,222
295 445

*Includes the areas that have since gone over in full or part to Pakistan.

Expressed in yardage. Bombay had a surplus of 2,169 million yard, for the basis of production of 1345) while the rest of the country including the production of 1345 while the rest of the country notion and yards. The average per cente consumption has been assumed as 18 yards per annum, the highest consumption being it respect of Bombay and Punjash with 245 yards per head

The delicit of 1550 million yards was proposed to be made up by the delicit of 1550 million yards was proposed to be made up by the delicit of the delicit o

INDIAN COTTON TEXTILE INDUSTRY - CENTENARY VOLUME

TABLE II

Estimated Annual Requirements of Cloth of each Area or Zone (1946-47)

Area or Zone as defined in the Cotton Cloth Vorenments Control Order, 1943.		Population figures scaled upto a tital se of 400 cuillion based on the 1911 Cenus repork	Placed lass of allocation of Cloth sallocation of Cloth sallocation and an annual	Definated social setate regalements of cloth per sesum.	Latinated clots that will be avail able storally for oral consumption produced by exita- log multa flee allowing for ex port of 480 million yard-	I stimated annual production of hand on loom cloth after allowing for export of 150 million yards	I otal of columns 5 and 0, i e total cloth available for ever consumption acoustly from Handlooms and existing Milla.	Aones rerples (+) or defect (-) i e Difference between Columns 4 and 7
Bombay surplus size Sind (necloding Balochatan) Defect Zuce Fought (necloding Dabh) Defect Zoce U.P. Defect Zone Boshar Defect Zone Boshar Defect Zone Bengal (necloding Assam) Defect Zone Ornse Defect Zone G.P. Defect Zone G.P. Defect Zone Sooth Defect Zone Sooth Defect Zone Repost Defect Zone	:	34 6 46 59, 37 76 17 21 83	24-5 16-6 24-5 16-5 16-5 16-5 16-5 16-5 16-5	830 93 1,100 995 610 1,235 250 346 1 366 379	2 678 157 340 12 220 118 279 316	121 5 165 132 50 170 31 72 599	2 999 5 328 472 62 330 31 190 678 320	+2,169 -94 -177 -482 -543 -845 -249 -156 -488 -59
TATAL	ļ	400	19 7	7 200	4,620	1,350	5,670	+ 2 169 - 3,699 tt - 1,530

^{*}Includes the ereas that have since gone over in full or in part to Pekistan

On the basis of the consumption of the pre war years and on the recognition of the need for the dispersal of the industry, it was estimated that the allocation of spindles in respect of plunned extensions and new mills would be zonewise as follows.—

The office of the Textile Commissioner askel for the installation of only 2,720,961 spindles, 1,205,674 spindles being fine and 1,515,287 spindles coarse. They did not allocate any additional spindles for the Bombay surplus area and the largest number was secured by Bengal with Punjab coming second. The Planning Committee, however, decided to increase the total number of spindles to be nextly installed to 2,752,000, 1,254,000 fine and 1,493,000 coarse. The Bombay surplus area secured an alloiment of

1,52,000 fine spindles to be mostly utilised by existing units. There was a reduction in the figure for Sind, Orissa and Bihrt on the score that the necessary skilled labour was not available locally. It was also said that it would not be possible to produce fine yarm without the requisite experience. In order to effect regional development, it was suggested that the quotas in respect of Bihar and Orissa might be surrendered to Bengal in respect of that portion which was not taken up by the first mentioned two provinces. It was also said that, in respect of other areas, unfulfilled quotas might be utilised by the Bombay or South Zones. The allocation of spindles along with figures of existing spindles will be noticeable from another Table given below.—

TABLE III

Allotment of 1.25 million fine and 1.5 million coarse spindles to various areas and zones recommended by the Post-War Planning Committee (Textiles)

	Areas or Zones as defined in the Cotton Cloth		Bpandles and 1 6 million cost			1 25 million 2,75 million	lion Calneleted Production of cloth from edditional spindles to million of yerds		
Movements Control Order, 1943			leb Januay 1945	F\se	Coarse	Total	Fino	Coarse	Total
d)			(2)	(3a)	(35)	(5e)	(4a)	(4b)_	(40)
Bombay Surples Area Slod (Including Balenkitan) Deficit Zoos Store (Including Balenkitan) Deficit Zoos U.F. Deficit Zoos Buthar Deficit Zoos Bengal (Including Assem) Deficit Zoos Ones Deficit Zoos Soosh Deficit Zoos Rajpataos Deficit Zoos Rajpataos Deficit Zoos	Total		5,941,164 9,216 224,023 773 283 25,040 480,024 374,030 1,055,533 519,222	152,000 152,000 152,000 38,000 180,000 76,000 380,000 76,000	73 000 423,000 198 000 162,000 260,000 112,000 74,000 120,000 74,000	152,000 75,000 576,000 350,000 200,000 150,000 150,000 560,000 150,000	64 64 64 16 80 16 32 160 32 523	58 332 155 127 204 87 58 94 56	64 53 396 219 143 234 103 90 251 90

^{*} Includes the areas that have since gone over in full or in part to Pakistan

The question now arises about the extent of progress made in regard to further development of the industry and the position of the industry after the partition of the country. It can at once be said that not much progress has been made in installing new spindles especially as import of new

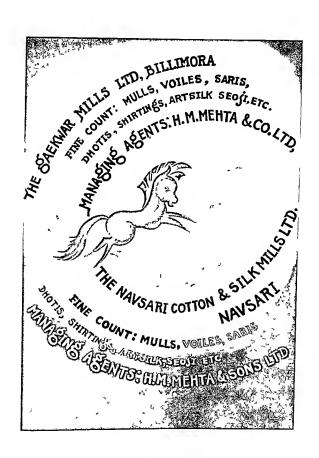
machinery has been difficult and it has not been possible, full recently, even to secure the requirements of established units for purposes of renewals and replacements. At first there was some expectation that the new units would be able to make significant progress and that it would be possible to avoid concentration in existing units. The expecta tions in this regard have not, however, materialised as the new units have not been able to make use of the funds at their disposal and the prospectus estimates have in many cases proved to be incorrect. It was not expected that there would be such an increase in prices for capital goods and that it would take such a long time for the goods to be secured As such the question does not arise at the moment, as in the case of the sugar industry, whether it would be permissible to install additional capacity or whether deve lopment should be on an ordered and an orderly basis. It would certainly be a great advantage if the new units, which were floated in the boom of 1945 46, could be enabled to function and the allotted quotas in respect of spindles and looms utilised. But barring one mill in the Delhi deficit zone and another mill in the Orissa deficit zone there have been no reports of complete new units coming into existence, though it is still stated that efforts are being made to import second hand machinery or embark on projects which are not entirely connected with the original schemes The question, therefore, arises whether the original schemes have to be revised and whether the origi nal development schemes as envisaged by the government, would prove to be successful. It might be said that in the absence of a satisfactory agreement with Pakistan, there will be a surplus of 400 million yards and that allowing for the lower level of consumption on account of partition, the additional production of 1,700 million yards would not be necessary. In the scheme for producing an additional 1 700 million yards, about 300 million yards will automati cally go out on account of the allotment of spindles for the territories now in Pakistan Thus, there will still be need for extending output by 1,000 million yards even if it is assumed that Pakistan did not account for any portion of its usual consumption of 400 million yards from the Indian Textile Industry The capacity for production has been retained almost fully in the Indian Union, only a few thousands of spindles going over to Pakistan

Under the circumstances, the question has therefore, to be decided how best further expansion could be carried out and how the inequality in production in the various zones could be reduced. As stated at the beginning Bombay will still be the prominent producer and account for a good portion of the requirements of the rest of the country. The south deficit zone is perhaps highly suited for further deve lopment as also the CP deficit zone. Expansion in North East India would be necessarily slow though if the promoters were willing and active, better progress could be reported. In order to be able to achieve the target of 4,300 million yards for 1950 and provide the necessary quantity of yarn for the handloom industry, attention should be paid first of all towards increasing the efficiency of existing units. Thanks to the improvement in the financial position of most of the mills in the industry, it can be said that replacements and renewals could be effected on ordered The Central Government should take particular care, in conjunction with the States, to meet the require ments of the various units and help in the formulation of specific schemes. Private enterprise has not been lacking in its efforts so far and it must be said that only the existing units have been able to report important progress. Kohinoor, and Buckingham Carnatic being outstanding examples If side by side with the improvement of the andustry attention could be paid to the promotion of new units or the effective functioning of such of those units as formally came into being in 1945 46, a plan would emerge which might roughly accord with the intentions of the Post War Planning Committee Between 1945 and 1950 conditions have so thoroughly changed that it would be necessary to look at the various problems from a completely different angle. More important than any question is the fact that the tastes of the consumers have vastly changed and that the industry has to go 'finer' This is not an tass task as, apart from the technical difficulties involved, trette as the problem of readjustment of machinery. Also the tendency to go finer' would necessarily result in a lover output of varu and cloth produced

Apart from the financial and technical aspect, there is also the difficulty in securing rate material supplies. Ecfore the partition of the country, there was no problem of securing adequate supplies of short, medium and long staple cotton because the best varieties were grown in Paksian and special types of cotton were imported only for mixing purposes. At the present moment, however, the industry is dependent for its requirements of over 1 million bales of long staple cotton a year on outside sources which have to be secured mainly from Paksian.

Over a period, the problem of eotron supplies would certainly be solved as it would mean a reduction in the cultivation of short staples and an increase in the acreage under long staple cotton. In view of the success which has attended the schemes of the East India Cotton Association in encouraging the development of long staple cotton, there is no need for any misgivings in this regard. But the progress would necessarily be slow. In the meantime, the production programme will have to be adjusted in such a way that the capacity of the industry is fully utilised and at the same time the requirements of the exchange budget are properly fulfilled It must be said that the recent proposals of the Government of India are essentially sound in nature, it being expected that, with an export of 800 million sards per annum and the removal of restrictions on prices for exports the additional expenditure in foreign exchange for importing 1 million bales of foreign cotton would be found from increased exports of finished goods

A revision of the schemes for the development of the industry in relation to the changed condutions in respect of riw material supplies, will necessarily mean hard thinking and effective co-ordination between the producer, the totion grower, the States and the Central Government It is only to be hoped that the problems of the biggist national industry in India will be properly understood and solutions evolved which will retain for the industry the material state were secured during the war years. There must never be a return to the depression days of the early thrities. In view of the vast potentialities of the home market and the capacity of the industry to solve its own problems, the provision of facilities should be more than sufficient, though the development of the industry on new lines will need constant supervision and encouragement





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DOEDD AST JARTHSS SHT TO OSTOSTHE ... ALEE XII

THE COTTON TEXTILE INDUSTRY AS DETERMINANT

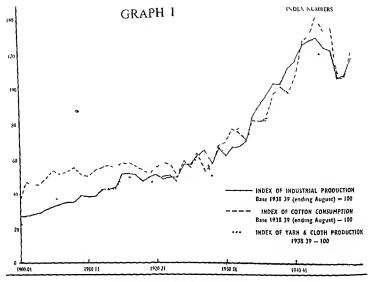
By E. P. W. da COSTA, M.A. (Oxon.) Editor, "Eastern Economist"

IT is one of the commonplaces of Indian economics that the cotton textile industry is our largest organised industry whether in gross output value, not value added by manufacture, or employment But it is not recognised even by those closely connected with industrial affairs how dominating the textile industry has been in Indian industry Lord Kelvin is credited with the remark that we know very little about a thing until we have contrived to measure it, and measurement of one thing in isolation is very far fmm. giving knowledge of any consequence. It was in some such sense that it was asked what they know of Plato who only Plato know It is clear that an appreciation of the position of the cotton textile industry requires measurement of industrial production generally as well as of employment and other things. The purpose of this article is to attempt such an analysis using available figures for the fifty years of this century For a centenary volume one might have hoped that the period would be a hundred years. Un

fortunately, figures are not available for many items prior to 1900 and in fact even the figures in this half-century are not of uniform worth

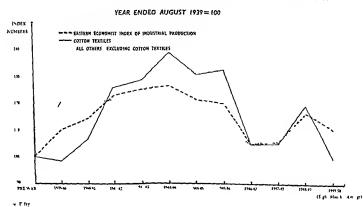
Production

For total production as well as for the cotton textile industry, the method followed has been to link 'The Eastern Economist' Index of Indian Industrial Production with Dr. Meek's index. The accompanying graph shows the results so obtained and it will be obvious how close the correspondence is in every way. There is some divergence between undices of cotton consumption and cloth and yarn production in a manner which suggests that the time lag involved in production is significant. For this purpose and to suggest some further analysis in regard to figures which seem somewhat unival, both cotton consumption figures and production figures are given in the following Table (Please turn over)



INDUSTRIAL PRODUCTION

GRAPH II



		F	

Fecal year April to March	No. of Mills	Production of yarn (in Million 15%)	Production of woven goods (in Million 153.)	Cotton consumed (000 bales of 392 1bs)	Industrial production index
1900 — 1901 — 1902 — 1903 — 1904 — 1905 — 1905 — 1905 — 1905 — 1906 — 1907 — 1908 — 19	176-178 178 181 191 194 199 218 221 217 222 227 227 227 227 227 229 240 242 240 250 274 251 270 271 281 211 212 230 242 240 240 240 250 241 250 277 281 281 281 281 281 281 281 281 281 281	333 576 673 674 674 674 674 674 674 674 674 674 674	997 1197 1197 1197 1197 1197 1197 1197	1.755 1.755 1.755 1.755 1.755 1.755 1.750 1.750 1.750 1.750 1.750 2.750	2012 2012 3 3 2 2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3

* The figures are not comparable

The figures relate to the year ending 31st August

The year 1900 corresponds to 1900-01. The Eastern Economist Index has been carried back to 1932-33 and has been lanked with Sir David Meek's, Index (hase 1911-12 to 1913-14) upto 1911-12. Figures before 1911-12 have been calculated on base 1905-06 and linked with the figure for 1911-12.

The divergencies between the textile curve and the total production curve are as interesting as the periods where the curves converge. In the year 1905 06 the textile industry contributed as much as 60 per cent to the gross industrial production in what are now organised industries. While this figure has shown a fairly steady tendency to fall indi cating a fall in the dominating position of the cotton textile industry, the rate of rise of industrial production has only departed significantly from that of the cotton textile indus try after the year 1935 This is in part due to the larger role played by sugar and the extension of jute, but even here if we take the cotton consumption figures, the parallelism is very close In 'The Eastern Economist' Index, the weightage given to cotton textiles is 40 in 100, on the basis of gross output value in 1939 This in itself accounts for quite a great deal of the parallelism, but what is interesting is that, although the cotton textile industry is less than half of total output in this index, fluctuations so closely follow the textile industry trend

Fluctuations

The extent to which the general index has responded to cotton textiles is, perhaps, even better illustrated by an examination of fluctuations in the last ten years. The three curves in Graph II show the cotton textiles index, the general index, and a computed index of other items on the hypothetical assumption that there was no cotton textile production In some respects, the results here differ from what one might expect at first sight. The non-cottontextile output rose to a peak in 1939-40 and is nearly back now where it was then At the present time, it is the recovery of the non textile section which is holding the general index. If this recovery were not present, the General Index would be almost back to its pre war level For almost the first time there is a significant influence moving the opposite way, the total index is still downward but the components are almost equal and opposite. If this trend should continue, the cotton textile industry will be contributing less than a third of total production, a factor which may require a revision of the index which gives it a high relative weight (PTO)





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Employment and Labour Relations

It is of interest to follow out the part played by the cotton textile industry in the direction of employment and of labour relations. The first of these is shown in Table II and the second is a graph which indicates the number of man-days lost in industrial disputes in India since 1921. The dominance of the cotton textile industry in the latter case particularly is too obvious to need any explanation.

(See GRAPH III helow)

Conclusions

The broad conclusions which this analysis suggest practically draw themselves. Industrial production in India has been in the past as nearly as may be a function of cotton textile production, but the dominance of the industry is being reduced absolutely and relatively in respect of fluctuations and at the present time it probably occupies a less significant place than at any time in the last fifty years. There are, of course, temporary factors, such as the shortage of cotton responsible for the decline. But it should be clear enough that this decline is large enough in itself to offset production elsewhere. Hitherto the cotton textile industry was significant in the manner in which it raised the index, at the present time it is acting as a drag, its dominating position is not raising the index but pulling it down.

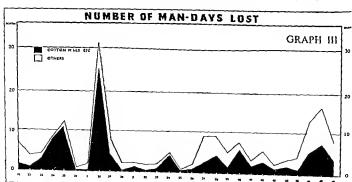
TABLE II

(In 000s)

l ear		Fuploys ent in Cotton Mills.	Total Employ ment in Orga n ed Indus tries.	Man days lost in Cotton Industry sec.	Total man days lost
1989	i	220	1 705		
1909	-	220	1 -86		
1918	-	215 214	7./3	1 22	
1911	-	221	792		
142		24,	8 0		
1913		214	938	-	
1914		241	. 951		
1915		150	1 004		
1918		241 256 286	1 001		
1317	-	269	1 0"6		
1918		288	1 140	-	
1614		282	1 172	_	
19 0 1921		304	1 234		
1921		313	1 265	1 794	5 501
1993		372	1 361	910	3 851
1973	_	714	1 103	3 00%	4 6 79
1474		335	1 456	8 111	8 60°
11 25		335 330	1 197	11 054	12 424
1976		341	1.51#	19	100
1927	**	743	1 533	350	2 013
1999	_	333	1 520	21 851	31 633
1829	-	313	1,553	6 353	1215
1930		358	1 829	354	2 165
1931		341	1 431	1 409	2,313
193° 1933		395 387 343	1 490	546	1,991
1934		357	j 40u	1 134	2 164
1935	••	437	3 48, 3 611	4 375	4 720
1936		428		572	2347
1927		4-8		1 043 2 571	8 991
1933		516	1738	4 443	\$ 199
1939		457	1 751	1 469	4 993
1640		481	1411	6 67 4	7 577
1841 1910		596	2 186	5 574 1 508	7,577 3 331 8 750
1310		118	2 2 9 2	2553	4.760
1943	***	811 851	0.428	3,345	2.543
1944	-	657 658 (² 0	. 252	1958	0.444
3945	**	658	2 8 43	1 140	4 054
1916		1,50	2 5 2 2 4 3	4 440	12718
1947		633 635	1 2 35	7 204 3 744	19718 19718 18,500 7 930
1818.		635	2 3011	3 744	7 936
lsis	-		L	2 880	1 6 491

* First half of 1948 only

† Estimated







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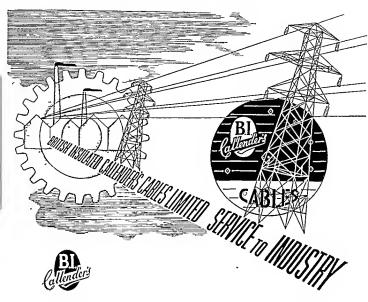


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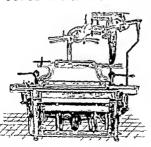
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THE EMPLOYMENT SERVICE

IN INDIA — ITS ROLE IN THE RECRUITMENT OF TEXTILE WORKERS

By Dr N DAS, Ph D, ICS

Director General of Resettlement, and Employment, Ministry of Labour, Government of India

THE National Employment Service in India was set up as one of the major post war measures of the Government to tackle the problems arising from the dispersal and resettlement in eivil life of the large body of returning Servi ces men and discharged war workers. The Service eame into being in July 1945, and is still in its infancy. During this period of trial, it has had to contend with a vast mass of prejudice and has had to shoulder very heavy responsi It was only natural that the Employment Service, simply because it offered a free and impartial service was viewed with utter hostility by the profit making middlemen who have been the agents for praetically all industrial reeruitment. It was also natural that, being a new expers ment, it was entirelly and even suspiciously looked upon by employers The employment-seekers were sceptical about its effectiveness, and the public indifferent to these difficulties, the Service came into existence at a time when demobilisation was proceeding at a fast pace and the employment field was rapidly shrinking. Just when the Service was settling down to discharge the heavy responsibi lities entrusted to it it was called upon to shoulder the additional task of resettling the vast numbers of displaced persons from Pakistan—a task which would have severely tired all the resources of any well-established institution these heavy odds, the Employment Service has made good progress and has demonstrated that it is not only an integral part of any planned economy but a sheet anchor in times of national cress

Growth in Popularity of Employment Exchanges

Since its inception, the Exchanges have registered a total of \$1,88,394 employment seekers including \$0.3,562 liks placed persons. Of these 7.91 250 have been placed in employment and 25.791 given free Vocational and Technical Training. The fact that the lughest number of employers who used the Exchange Organisation during any one month has increased from 3.182 in undivided India in 1940 to 5.274 in 1949 illustrates the growing popularity of the Service among employers. At the same time there has been a too % increase in the monthly registration applicants for employment assistance which shows that employment seekers are naturally turning to the Exchanges as the nation 5 employment finding agency.

Technical and Vocational Training

Today, the Employment Service which was originally set up for a limited purpose, is truly national in character—it

lias been thrown open to all eategories of employment seekers Not only have the Union and State Government recognised the Employment Service as the agency for recruit ment of workers but leading employers and trade union leaders have expressed their appreciation of the Service At present there are 55 Employment Exchanges and 55 District Employment Offices functioning in addition to a Central Clearing House located at the Headquirters of the Directorate-General of Resettlement and Employment for the pur pose of encouraging the necessary mobility of labour from one region to another The Organisation also provides Technical and Vocational training at Training Centres set up in various States The Training Centres have a total capacity of 10,000 scats of which about 7,000 are in eng neering and building trades The object of the Training Scheme is to equip applicants with the skill necessary to increase their employability and to ensure a steady flow of skilled workers to the country's industry

Effective Working of Exchanges

The main reasons why the Employment Exchanges have been able to render effective service in times of difficulty and in meeting the day today demands of employers and workers are (1) its scientific method of maintaining reenrils of vacancies and employment-seckers which facilitates selection from a wide field and accurate matching up of applicants against vacancies, and (2) the adaptability of the internal organisation of the Exchanges to suit the needs of the local employment market.

Specialised Departments

The internal organisation of an Employment Exchanger is designed to suit the employment needs of the employers and workers of the area within which it operates. Generally speaking the internal disvision of Libour within an Exchange is on broad occupational basis but in begge office where the volume of demand for assistance from workers and employers in a particular industry is sufficiently large and well-defined, specialised sections dealing with the particular industry have been set up. I or example, at it-Regional Employment Exchange, Bomhay, a special sel section exists which registers textule workers and received formands for them. The Regional Employment Exchange, Kanpur, has opened special sub-offices to deal with the day to-day demands for textule workers.

Another important reason for the success so far achieved by the Employment Service has been the close association of the chief participants in industry, namely employers and workers, with the Employment Service. It would have been impossible for a voluntary service lake the Employment Exchange Organisation, which places no compulsion on the part of employers to notify their vacancies to the Employment Exchanges nor compels employment seekers to register themselves at the Exchanges, to discharge its functions without the co-operation and the goodwill of both empoyers and workers.

Advisory Committees

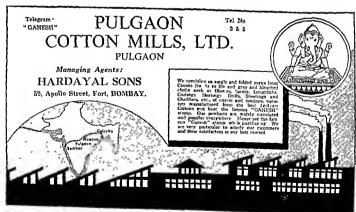
Machinery for securing the co-operation of employers and workers has been provided in the form of advisory commit tees which have been set up at different levels of employment service operation. The advisory committees, Central, Regional and Subt Regional, have done very useful work inasmuch as they have not only helped to popularise the Service but have helped in the formulation of national policies governing the Employment Service and also in over coming the problems which confronted the Organisation in its infancy.

While the advisory committees are indispensable to the proper functioning of the Employment Service, their object in the main has been to assist and secure a smooth and effective operation of Employment Service as a whole and to advise on any question of importance in the entire local employment seene. There is, however, need for closer collaboration between the Employment Service and management and labour on an industry bans so that the problems of labour supply and effective utilisation of the existing

labour in particular industries might be jointly solved While one of the essential duties of all Employment Officer is to maintain close contact with employers and workers as the particular industries and undertakings in the Loci Office acea, there is need for this collaboration being brought on a more systematic and formal basis. This would enable the Employment Service to effectively tackle the problems of particular industries and undertakings and to play a truly constructive role in the employment market. The scheme for the recruitment of industrial workers through the Employment Exchanges and decasualisation of labour time toned by the Ultar Pradesh Government is a beginning made in this direction.

Vital Role of Employment Service

The Employment Service stands on the threshold of a new and difficult period. The country is passing through a period of economic crisis The fear of slump in industry and consequent hesitancy on the part of industrialists to invest, the closure of existing mills and the insistent demand for severe economies in Government departments have resulted in the inevitable reduction of employment opportu nities and in increase in unemployment. It is in circum stances such as these, more than in any others, that it becomes vitally important that the manpower resources be utilised and that all available employment opportunities be distributed to the best advantage of the country. In this, as well as in any plan that the country may adopt to meet the situation, the Employment Service will have a vital role to play Given the necessary co-operation, the Employment Service will prove itself an invaluable instrument for the promotion of the country's industrial well being



THE TRADE MARKS REGISTRY—

Its Benefits to the Textile Industry

By K. S SHAVAKSHA, Registrar of Trade Marks Bombay

THE Trade Marks Act was passed in 1940, but the main provisions of the Act did not come into operation till 1942. At that time there were in effect two Registries in India, one in Calcutta attached to the Patent Office, and the other at Bombay, which was restrated to trade marks in respect of textile goods. It was soon found that such an arrangement was impracticable, and in 1943 the Trade Marks Act was amended so as to establish one Registry in India. The head office of the Registry has since been established at Bombay, but a branch of the office still functions in Calcutta.

Trade Marks Legislation

The nature of the work under the Trade Marks Act is such that unless there is one office throughout India it would be impossible to ensure uniformity of practice and lack of conflict of registered trade marks. About the year 1945 certain Indian States passed Trade Marks Acts similar to the one in India and other States contemplated doing 50 The difficulty of the situation was immediately realised by the commercial community As there were 400 odd States in India, there was nothing in theory to prevent each State from passing a Trade Marks Act and demanding registration in that territory Although from the practical point of view all Indian States would not have passed such legislation, yet it was appreciated that at least 20 major States would possibly do so In order to overcome this difficulty, reciprocal arrangements were arrived at between those States which had passed trade marks legislation and what was then British India The effect of this arrange ment and the consequent legislation was that for all practs cal purposes British India and the Indian States were considered one unit and registration in any Registry became effective throughout British India and the Indian Stares This arrangement has had the effect of preserving the interests of the commercial community in their tride marks

Jurisdiction of Trade Marks Act, 1940

On the 1st April 1950, the Trade Marks Act was extended to the whole of India except Jammu and kashmir It will be apppreciated that the position with regard to trade marks in India would have been extremely difficult if reei procal arrangements had not been arrived at with the Indian States

The Act in Working

There can be lattle doubt that the Trade Marks Act of 1940 has been wholeheartedly supported by the commercial community. Nearly 1,50 000 applications have already been made. In the nature of things there has been delay been made. In the nature of things there has been delay nadjudicating upon the rights of the applicants, but the Trade Marks. Registry has now reached a stage when it can issue its first order almost within two months of the receipt of the application. From 1942 onwards a number of cases have been heard by the Registrar and the Deputs Registrar From some of their decisions appeals have been taken to the High Courts and it is a matter of gratification note that so far not a single appeal has succeeded

Impartial Standards

Apart from the fact that the Registra has to apply the law, it is the duty of the Trade Mark Registry to see that all applicants are treated alike. In course of time, practice in reference to many matters crystallizes and in order that there should be no doubt as to it e practice, it should be inflexible. It is the duty of the Registrar to feel the pulse of the commercial community and of commercial from the total law to be taken into account and no trade mark should be registered which would have the effect of embarrassing other traders or of confusing the public.

Page Fifty five

The Registry at Work

The work in the Trade Marks Registry has to be done methodically and this involves considerable labour. Each application including the trade mark has to be indexed in There are the nominal index, the word index, the terminological index, the index of devices and other indexes. Unless such indexes are prepared, it would be impossible to examine each application properly, and unless the examination report is correct, it would be impossible for the Registrar to pass accurate orders. In the first instance all matters relating to an application are expressed in correspondence and this involves, heavy clerical work Ordinarily, over 12,000 letters are received in and desnatched from the Trade Marks Registry at Bombay every month. The applicants are entitled to be heard personally and many hearings take place not only as between the applicants and the Registrar but also as between the appli cants and the opponents From all decisions of the Regis trar appeal lies to a High Court

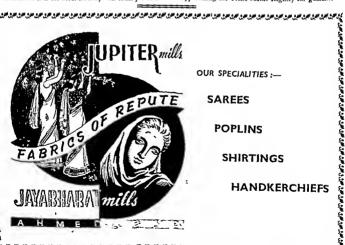
Matters of great importance have arisen for decision and in recent times perhaps the most interesting set of cases is that relating to enemy trade marks

As far as India is concerned, it is of interest to note that the highest number of applications comes from the Tevule Industry. The second industry to take pride of piace in the number of trade marks applied for is the pharmaceutical industry. Another industry from which a large number of applications comes is the beed industry. As India proceeds

Page Fifty-sus

to be more and more industrialised, greater will be the demand for registering trade marks. It is a common fail ing of merchants to hit upon a trade mark and then immediately begin to use it and thereafter to apply for registration for the same Although they may have adopted the trade mark in all honesty, it very often happens that it conflicts with a registered trade mark and therefore the conflicting trade mark cannot be registered. This often leads to hardship, for in the meanwhile the merchants would have spent perhaps a large sum of money in adventiing the mark and in printing labels and doing other things in reference to the mark. All such exertions and expendi ture are wasted if the mark conflicts with a registered mark It is, therefore, advisable for the merchants to make use of the Trade Marks Registry for the purpose of finding out whether the mark proposed to be used by them is registrable

No doubt there has been considerable confusion in the past with reference to trade marks merely because there was no proper system of registration of trade marks. But now that the Trade Marks Act has been functioning for some years, there can be no excuse for any merchant to adopt a trade mark which is likely to infringe another merchants trade mark or which is likely to cause confusion amongst the public. Every endeavour is made by the staff of the Trade Marks Registry to assist the public in solving their difficulties, and merchants should have no heistation in approaching the Trade Marks Registry for guidance



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COTTON

IMPROVEMENT WORK IN INDIA DURING THE PAST 25 YEARS

By SARDAR DATAR SINGH, Vice Chairman Indian Council of Agricultural Research

COTTON occupies an important place in the agricul tural as well as the industrial economy of India In the early twe enties the indigenous production of cotton was not only adequate for meeting a major portion of the requirements of the local Textile industry, but it also provided a substantial surplus for export. The following figures depict the cotton position of the country in 1923-24—

Year	Acreage	Produc-	Consumption of Indian cotton in Ind so mills.	Consumption of all kieds Ind an cotton.	
1973 04	000 s	000 s	000 s	680 a	000 e
	acres.	bales	bales	bates.	bales,
	2d 501	6 055	1 936	1 918	3 764

The improvement of the quality of the crop was the most urgent need of that time. The Provincial Depart ments of Agriculture, which had started the work of cotton improvement some years earlier, had evolved a few good strains and distributed their seed to the fairners to some extent.

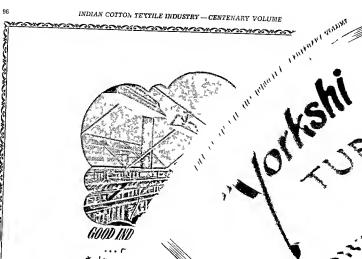
Work of the ICCC.

However, it was not until the Indian Central Cotton Committee was established in 1923 that cotton improvement work was started in right earnest. The aim of the Committee from the beginning was to supplement the work of the Agneulural Departments by providing funds for research into agricultural as well as technological cotton problems of an all India importance and for development extension and marketing of improved varieties of cotton in various tracts. The Committee has so far finunced about 150 160 schemes a large number of which were for orecding high yielding superior types, some for the study and control of the important cotton pests and diseases, a few for physiological studies of the crop growth and a good number for the extension and marketing of improved varieties of cotton. The funds expended so far on these

schemes amount to about rupces 2 erores, derived either from its own source of revenue, namely the cotton cess, or from the grants made to the Committee from time to time by the Government of India

Increased Growth of Superior Varieties

The major achievement of this improvement work is reflected in the extension of area under superior varieties Whereas the production of cotton of staple length 7/8' and above was 1,137 000 bales in the quinquennium 1917 22, it amounted to 2 649 000 bales in the period 1942-47 The proportion of long staple cotton increased from 26% of the total production in 1917 22 to 38% in 1937-42 The corres ponding proportion in 1942 47 was 67%, but this phenoroenal rise was due partly to the replacement of short staple cotton by food crops under the Grow More Food Campaign and partly to real extension of the area under improved types. In 1947 48, after the partition of the country, of the 10.9 million acres under cotton in the Indian Dominion, the area covered by the improved types was 51 million acres or 47% Taking a bird's eye view of the cotton crop grown in the country, one finds from the Puniab in the North down to Madras in the South, a string of improved varieties which are steadily ousting the inferior types now in cultivation LSS and Hariana in East Puojab Kalyan Vijay, Suyog Jarila, Jayadhar and Laxmi (each one meant specially for a distinct tract in the State of Bombay) V 434 H 470 and Buri 107 in Madhya Pradesh , Malyi 9 and Indore I in Madhya Bharat, Pratap in Sau rashtra, Gaorani 6 Gaorani 12 and Parbhani American in Hyderabad, MAV and Selec 69 in Mysore, and lastly the Cambodia strains Co 2, Co 3, Co 4 and Co 4 B 40 in Madras have been in popular demand for several years past in their respective areas. Had it not been for the urgent need of attaining self-sufficiency in food and the great competition arising from the price structure of the food and some of the cash crops the cultivation of medium and long staple varieties would have extended a great deal more than nt has actually done so far Assuming that the improved varieties gave to their growers an additional return of only



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19°a 24	000 s	000 e	000 s	000 s	000 e
	acres,	bales	bales	bales.	bales.
	og 801	6,088	1 836	1 918	3 764

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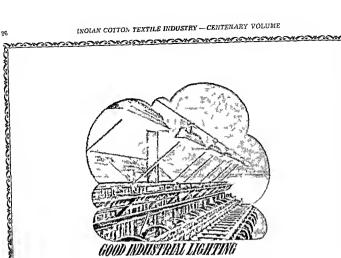
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Rs 12 per acre (in some cases it was much more), the total extra income carned by the farmers in 1947-48 amounted to Rs 616 crores. This additional income earned in one year was over three times the total expenditure incurred by the Committee during the past 26 vers in India including Pakistan. The spread of the improved varieties has not only benefited the cultivators in cartinia additional income but has also enabled the manufacturers to secure better cotton of known qualities in bulk, quantity from indigenous sources. In fact, it will be seen from the table given below that the increased production from the superior varieties has been completely taken up by the Indian mills.

Zear	Production	Mill			
	Long staple (7/8 and above)	Medium staple (below 7/8 & above 11/16)	Short stap le (11/16 and below)	Total all staples	consumption* (Indian cotton)
1942-43	1 370	2 (98	1 234	4 702	4 307
1913-44	1 489	2 499	1 271	5 259	4 119
1944-45	1,134	1591	\$65	3 550	4 159
1945-46	892	1 716	993	3 530	3 571
1946 47	878	1,703	252	3 213	8101 1
Average 1942-17	1,153	1 933	1 041	4 117	3 921

^{*}Year ending 31st August TExcludes Pakistan from the 15th August 1947

Average Yield per Acre

The extension of the area under improved vaneties has been accompanied by a not inconsiderable rise in the yield per acre. Notwithstanding this progressive increase, the acre yields in India are still fair from being satisfactory. They are not even half of what the American acre yields

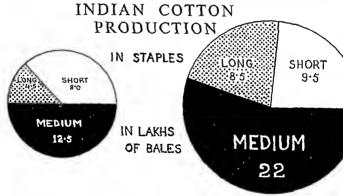
are and as such there is still much scope for improvem in this direction. The main difficulty, however, is imost of the Indian cotton crop is grown under rain conditions, and yields, therefore very enormously hyyear to year depending upon the vagaries of the monse Purthermore, the cotton crop is rarely manuted duri all the available manure being applied to the food or grown independently or in rotation with cotton

Pest Control

The research sponsored for the study of cotton peas diseases, and the physiological investigations pertains the behaviour of the cotton plant have saved cotton go from recurring losses running into crores of rupese eyear Particular mention may be made of the effort control the boll worms, stem weevil, the cotton will and Trak disease (defective holl opening). The annual sa to the growers in Madhya Pradesh and Bombay Karn by the spread of will resistant varieties (which now cabout 17 lakhs acres) is estimated to be about Rs 681 is

Effec's of Partition on Cotton Supply Positi

Since the First Great War, much effort and var sun money had been expended in increasing the cultivition medium and long staple cotton in the fertile irrigated to Sind and West Plunjab. The production of this of cotton increased from 114,000 bales in 1915-16 to 125, bales in 1946-47. Practically the whole of this valuable duce was used by the Indian textile industry. With exclusion of Sind and West Punjab from India when country was partitioned in 1947, the Indian milk le supply of about 9 Jakhs bales of long and medium as



PRESENT 2,500,000 BALES ON 11,000,000 ACRES

4,000,000 17,000 cotton from this source. This has created a serious position and the attention of the Government as well as the public is now focussed on the necessity of making good the loss quickly. (The imports into India to the time of 6 to 7 lakhs bales of long staple quality cottons from East Africa. Sudan and Egypt cannot be replaced in the near future without further intensite work and irrigational and manural facilities but what has been proposed by the Cotton Committee and expected to be achieved within a space of two to three years, is the climination entirely of the Pakistan cottons.)

Programme of Planned Production

To achieve this object the Indian Central Cotton Coin mittee has submitted to the Government of India a programme of planned production of which involves the increase of area under medium and long staple varieties by about 40 million acres spread over different States introduc tion of cotton as a rotation crop on the vast area of land which will be reclaimed by tractor ploughing in the cotton growing tracts of the country replacement of short staple cottons by long and medium staple cottons especially in the irrigated tracts of East Punjab the Union of Patials and East Punjab States and in some heavy rainfall areas of Hyderabad State. The supply of manure on a large scale and making available of irritational facilities have also been recommended to enhance the yield per acre and thus augment the total production. An intensive organised drive for the implementation of the plan is now under active consideration. The textile industry may well be assured that no effort will be spared to supply the major part of its requirements of raw cotton from indigenous sources

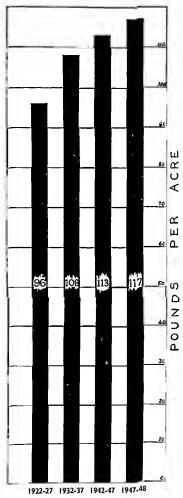
Technological Research

In addition to the evolution of improved types of cotton and the large scale expansion of their cultivation a good deal of technological research has been conducted to assist the cotton breeders in their work of erop improvement. This work is done in the well-equipped Technological Laboratory set up in Bombay by the Indian Central Cotton Committee. This laboratory also renders service to the cotton trade by publishing results of spinning tests on stim deal Indian cottons and commercial types of each season.

Legislative Check on Standardisation

A good deal of attention has also been paid to the main tenance of the punity of improved cotton varieties by legislative means. The banning of the cultivation of inferior cottons such as Garrow hil cotton in Madhya Pradesh and Pulichai in Madras and the establishment of one variety for the cultivation of improved varieties in many States are instances of what has been done by legislative measures. The Cotton Ginning and Pressing Factories Act 1925, is designed to check malpractices of invining watering and false packing at the ginning and pressing factories.

Thus it will be evident that all the efforts made in the are directed towards one object namely, to try to produce pure unmixed improved quality cotton in increasingly large quantities, which would benefit both the grower and the textle manufactures.



Rs 12 per acre (in some cases it was much more), the total extra income earned by the farmers in 1947-48 amounted to Rs 616 crores This additional income earned in one year was over three times the total expenditure incurred by the Committee during the past 26 years in India including Pakistan. The spread of the improved varieties has not only benefited the cultivators in earning additional income but has also enabled the manufacturers to secure better cotton of known qualities in bulk quantity from indigenous sources In fact, it will be seen from the table given below that the increased production from the superior varieties has been completely taken up by the Indian mills

) ear	Production	Will			
	Long steple (7/8 and above)	Med um etaple (balow 7/8 & above 11/15 1	Sho totape le (11/16 and below)	Total all	(Indian entron)
1942-43	1.370	2 193	1 234	4 702	437
1913-44	1 419	2 493	1 71	5 2.9	4 119
1944-44	1 134	1,551	865	3 * 93	4 159
1915-46	892	1 -36	90>	3,531	3 971
1946 47	878	1-3	933	3 513	3 1 1 1
Avarage					
1942-17	1 (53	1 903	1 041	4 317	3 921

^{*} Year ending 31st August † Excludes Pakistan from the 15th August 1947

2.500.000 BALES ON

11,000 000 ACRES

Average Yield per Acre

The extension of the area under improved varieties has been accompanied by a not inconsiderable rise in the yield per acre Notwithstanding this progressive increase, the acre yields in India are still far from being satisfactory They are not even half of what the American acre yields

are and as such there is still much scope for improvement in this direction. The main difficults, however, is that most of the Indian cotton crop is grown under rainfed conditions, and yields, therefore very enormously from year to year depending upon the vagaries of the monsoon. Furthermore, the cotton crop is rarely manufed directly all the available manure being applied to the food cross. grown independently or in rotation with cotton

Pest Control

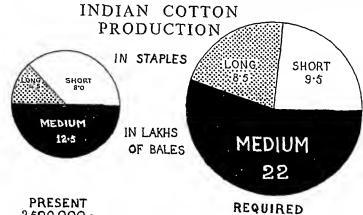
The research sponsored for the study of cotton pests and diseases, and the physiological investigations pertaining to the behaviour of the cotton plant have saved cotton growers from recurring losses running into erores of rupees even year Particular mention may be made of the efforts to control the boll worms, stem wee il, the cotton wilt and the Tirak disease (defective boll opening) The annual saving to the growers in Madhya Pradesh and Bombay Karnatak by the spread of wilt resistant varieties (which now cover about 17 lakhs acres) is estimated to be about Rs 68 lakhs.

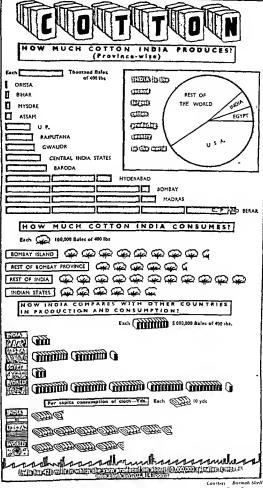
Effec s of Partition on Cotton Supply Position

Since the First Great War, much effort and vast sums of money had been expended in increasing the cultivation of medium and long staple cotton in the fertile irrigated tracti of Sind and West Punjab. The production of this type of cotton increased from 114,000 bales in 1915 16 to 12,57,000 bales in 1946-47 Practically the whole of this valuable produce was used by the Indian textile industry. With the exclusion of Sind and West Punjab from India when the country was partitioned in 1947, the Indian mills lost a supply of about 9 lakhs bales of long and medium stapled

4,000,000 BALES ON

17.000.000 ACRES





PLANNING

COTTON PRODUCTION

By R. G. SARAIYA, Vice-President, Indian Central Cotton Committee

World War II and Plan for Reduction of Cotton Acreage

THE need for planning cotton production in undivided India assumed considerable importance during World War II, as in the initial years of the War, with the loss of the Continental and Far Eastern markets for Indian Cotton, short staple cotton became a drag on the market Simultaneously, owing to the stoppage of rice imports from Burma and other South Fast Asian Countries, it was felt The question of adjusting, as far as possible, the supply of short staple cotton to probable demand and of the diversion of the area released to other crops mainly foodgrains, was considered by the Indian Central Cotton Committee at its meeting held in January 1942 and the following resolution

'In view of the necessity and urgency of avoiding any further glutting of the Indian cotton market with short and fair staple cotton hereafter, the buyers of which have been cut off from the Indian market owing to the present hostilities which may run for a period which cannot be estimated at present, the Indian Central Cotton Committee requests the Government of India to urge all Provincial Governments and States in India especially those in areas where short and fate staple cotton is being grown, to reduce areas where snort and tart stapic cutton is using grown, to iccure
the existing acreage under such cotton forthwith by at least 50
per cent. As alternative to short and fair staple cotton such per cent. As atternance to short and rair staple conton such other crops may be encouraged as may eut the conditions of each area preference being given to foodgrains adequate storage area preference of which will continue to be a matter of whal national reserves of which will continue to be a matter of whal national reserves of which will continue to be a matter of vital influence importance for a number of years to come. To stimulate and accelerate such change. Provincial Governments and States should accelerate such change. accelerate such change Provincial Governments and States should be most effective according to local conditions in each Provinc-siance of the state of the entry of all of the state of the state of the state of the part of the state of the March next.

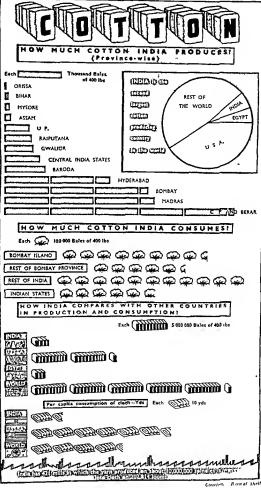
Accordingly, the Provincial Governments and States, especially in areas growing short staple cotton, were address ed to reduce the area under slort staple cotton forthwith by 50%. The "Grow More Food" Campaign simultaneous undertaken by Government on a countrywide scale to meet the food shortage in the country contributed to strengthen

the efforts of the Committee to reduce the area under short staple cotton Another factor which influenced the achieve ment of the objective was the replacement of the Broach, Oomras and Bengals contracts by the Indian Cotton Con tract with fine Jarilla 3/4" staple as the basis, which served to discourage the cultivation of short staple varieties. In fact, the target aimed at by the Committee in its resolution of January 1942 was almost realised in smuch as the cotton area in 1942-43 showed a reduction of 4,948,000 acres as com pared with the previous year, the production of short staple cotton having been curtailed by nearly 50% At the same time, the increased consumption of cotton, particularly of medium and long staple varieties by inills in iindivided India also gave a fillip to the increased production of such varieties by the diversion of area under short staple cotton to medium and long staple varieties. In the Central Provinces and Berat, a subsidy of Rs 2 per acre was paid to the grower in respect of the area under short staple cotton diverted to foodgrains This subsidy was met from the Cotton Fund created by the Government of Indra early in 1942 by the levy of an additional import duty on cotton, to undertake measures to assist the growers of cotton, particularly of short staple varieties 'owing' to the loss of important export markets as a result of the War

Intensification of Food Shortage and Drastic Curtailment of Cotton Acreage

In January 1943, the Indian Central Cotton Committee recommended the formation of Crop Planning Boards, both Central and Provincial, to ensure planned production of erops on an all India basis At the same time the Committee recommended that the acreage under cotton for the 1943-44 season should be restricted so as not to exceed the acreage in the 1942-43 season In June 1944, the Policy Committee of the Reconstruction Committee of the Council at the Centre recommended inter alia the preparation of produc tion targets for the different types of agricultural produce required by the country to meet internal as well as export demand and the establishment of a Central Crop Planning Council for the purpose In July 1944, the Committee which considered the position arising from the larger cotton

Page S xty



Page Sixty one

crop in 1943-44 and the accumulation of stocks of cotton. particularly of short staple in the country, despite the reduced crop in 1942.43 and the increased mill consumption, appointed a Cotton Planning Sub-Committee to eximine the part which cotton should play in the planning of agricultural production and to work in close collaboration with the proposed Central Crop Planning Council The Sub-Committee met in November 1944 and recommended inter alsa that for the 1945-46 cotton serson (a) the 1942 43 all India cotton area of 192 million acres should be reduced by 31 million acres, thus providing for a maximum cotton area of 161 million acres and (b) of the total reduction of 31 million acres, 20 million acres should be from areas under short staple cottons and 1,1 million acres from areas under low grade medium staple cottons. The extent of the reduction required to be made under each variety was also specified by the Sub Committee. The recommenda tions of the Sub Committee which were communicated to the Provincial and State Governments were endorsed by the full Committee at its meeting in January 1945 Mean while as a result of the promulgation and enforcement of the Bombay Growth of Food Crops Act, and the action taken by the Provincial Governments in connection with the Grow More Food Campaign, the all India cotton area in 1944-45 was reduced to 148 million acres and in 1945-46 st stood at 147 million acres being 99 million acres or 43% less than the acreage in the triennium ending 1938 39 During the same period, the area under food crops increased by 258 million acres and that under oilseeds by 12 million acres It may be stated here that during the war, the policy regarding food production did not condict with the cotton policy, in fact, the two policies were complementary

Post-War Need for Re-orientation of Cotton Policy

With the cessation of hostilities, the Indian Central Cotton Committee felt that a re-orientation of the cotton policy was called for, but it did not press for it having regard to the difficult food position in the country Accordingly, in February 1946 the Committee expressed the opinion that. although from the purely cotton stand point, an extension of the cotton acreage was highly desirable, in view of the gravity of the food situation in the country, the Government of India should be requested to address all Provincial Governments and States to take whatever steps were neces sary to restrict the cotton acreage for the 1946-47 season so that it might not exceed the acreage sown in 1945 46 In making the recommendation the Committee was aware that the maximum acreage suggested was below India's domestic requirements for raw cotton and cotton seed for cattle feed. At the same time, the Committee urged that every avenue should be explored to increase the yield per acre of cotton. The actual acreage in 1946-47 turned out to be only slightly higher than that in 1945 46

The question of the aereage that should be planted with cotton during the 1947-48 season was examined by the Committee at its meeting held on the 31st January and 1st February 1947. After extended discussion it was unanimously decaded that, provided the food position permits it, the Committee should press for an increase in cotton acreage in the 1947-48 season, especially in view of the serious shortage of cotton seed in the country. In this connection, a delegation from the Committee led by the writer waited on Dr Rajendra Prasad, then the Hon ble

Member for Food and Agriculture, in April 1947, at New Delhi and placed before him the views of the Committee As a result, the Government of India urged upon the Provincial Governments the necessity of not enforcing rigorously their schemes for reducing the area under cotton and of releasing a portion of the land diverted from cotton to be reverted to cotton. The actual acreage in 1947-88, howevers, was slightly less than that of the previous season owing to the price policy.

Post-Partition Planning to overcome Deficit in Cotton Supplies in Indian Union

The partition of the country into the Indian Union and Pakistan from the 15th August 1947, resulted in the assignment of the fertile and irrigated areas of Sind and the West Puniab to Pakistan. The area under cotton in the Indian Union in 1946-47 was 117 million acres and the actual crop about 255 lakhs bales. The Indian Union accounted for about four fifths of the total cotton produc tion of undivided India in 1946-47 Again the production of medium and long staple cotton in the Union represented some 45% of that in undivided India On the other hand, the Indian Union accounted for 98% of the total mill con sumption of all cotton (39.4 lakhs bales) in undivided India in 1946-47 The whole question of planning cotton production vis-a vis the partition of the country was examined by the Committee in March 1948 The Committee re commended inter alia that as compared with the 1946-47 season, the area under cotton in 1948-49 should be increased by 40 million acres under long and medium staple varieties. The target cotton acreage for 1948-49 was thus proposed to be 157 millions against 19.9 millions in the pre war year 1938 39 This plan as submitted to the Government of India also involves (1) the replacement of short staple cotton by medium and long staple varieties in the irrigated cotton tracts of the Fast Punjab and Patiala and East Punjab States Union and in some of the heavy rainfall areas of the Hyderabad State, (11) the in crease of the yield per acre, particularly of irrigated cotton, by the greater use of fertilisers, and (111) the provision of greater irrigation facilities through minor irrigation works for the growing of good quality cottons. No action was taken by the Government of India to give effect to this plan as a whole, in view of the repercussions the proposed increase in cotton acreage might have on the acreage under food crops The Committee at its meeting held in February 1949, after a review of the statistical position of cotton, again stressed the need for going ahead with the plan for increasing the cotton acreage by 40 million acres The need for fixing remunerative prices, particularly for medium and long staple cottons with a view to giving an incentive to the increased production of such cottons was also emphasized as will be seen from the following resolution on the cotton policy of the Government of India passed by the Committee at the same meeting -

This meeting of the Indian Central Cotton Committee expresses the coaters not the extono policy adopted by the Government of India Beades fixing lower prices for all cottons the differentials allowed by them for medium and long stuple varieties are such as well result in multifying the many years work of this Committee for improving the class and staple of different cottons

While the Indian Central Cotton Committee fully appreciates the need for increasing the production of food crops it strongly feels that the need for increasing the production of cotton in the Indian Dominion is equally great.

The Commutee therefore strongly recommends that the Gavernment of India should carefully consider the problem of ucreasing the production of cotton by diverting as much acrege to notion appossible and also reuse the flooris ceilings and the differentials to such a level as would induce the cultivators to extend the growing of improved sarreties

Need for Integrated Planning of Cotton and Food Production

At the meeting of the Indian Central Cotton Committee held in September 1948, the following resolution on the question of the place of cotton in Indias economy in the context of the partition of the country and other factors was passed which was subsequently forwarded to the Government of India —

That this meeting of the Indian Central Cotion Committee expresses its grate concern at the increasing dependence of the Indian textile industry on forcian supplies of cotion and strongly urges the Covernment of India to appoint a Special Committee express-indian the various interests concerned to consider exhausticely the whole question of the place of cotion in India's economy in the context of the partition of India and other factors and make recommendations on the subject at a very early date

The intention was that the Special Committee proposed in the resolution should examine the whole question comprehensively and speedily and make recommendations for a dinamic cotton policy both in its short and long term spects, with due regard to the seeningly conflicting laims of other crops

Latest Plans for Increasing Cotton Production

The Indian Central Cotton Committee at its meeting in Detober 1949 considered earefully the extremely serious totton position arising from (a) the diversion of acreage from eotton to other crops, mainly food and groundnist (b) the partition of the country, and (c) the devaluation of the currency accompanied by the high increase in the rupee price of foreign cotton. The Committee passed a resolution expressing the view that India should be self supporting in supplies of cotton of staple length upto I' in as short a period as possible and that for this purpose, the present annual production of roughly three million bales should be increased by about one million bales. The Committee also suggested how the increased production should be distributed between the different Provinces and States* The Committee further recommended that every attempt should be made to increase the production by increasing the yield per acre and utilising fallow lands for cotton, wherever possible Realising the difficult food position of the country, the Committee suggested that only the minimum acreage should be diverted from food grains to cotton, if necessary, subject to the condition that, where such diversion is inevitable, the Central Government should guarantee to make good to the Provincial and State Governments the shortfall in foodgrains The Committee also stressed that the Government of India should give the same high priority to the growing of more cotton as to the growing of more food, and should make available the required staff and funds to increase produc tion inter alia by such aids as fertilisers, improved seed, and

*Suggested increase in product on as compared with volving 57—fin label of bales. Bombay Province 5. Central Provinces and Berri v. So Esta Pennja and Pepsiu 68, Madras Provinces and Esta Pennja and Pepsiu 68, Madras Provinces and Esta Provinces of Provinces of Sourist Iran and Kirth 29—Total 10.12.

implements, including power implements priority of transport, irrigation facilities, etc. The Committee further suggested that in order to make cotton growing more attractive to the grower, the price of groundnut (the most scrious competing crop) should be controlled in the same manner as that of cotton

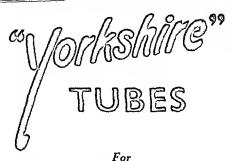
Arsung out of the above resolution, a plan for increased production of certain urgently needed varieties of cotton to the extent of five laksh bales during 1950 51 was con sidered at a Conference of Provincial Agricultural Ministers and representatives of the cotton industry the trade and the Indian Central Cotton Committee in November 1949. According to the plan, which was generally approved by the Conference, the expected increased production is intended to be achieved in two stages,—by extension of accrage, use of fertilisers, adoption of mixed cropping of cotton with groundnut and use of improved seed

Objective of a Sound Cotton Policy

A sound cotton policy for India should aim at producing sufficient cotton to meet internal requirements as well as to cater for a minimum export demand for short staple The short term objective should be limited to making India self-sufficient in regard to supplies of eotton of staple length upto I 'required by the Indian mill indus try Imports from Egypt, East Africa Sudan, etc of longer staple would, however, have to be continued for some years to come, until suitable strains are available for cultivation on a large scale as a result of the research work initiated in Madras Province, Mysore State and East Puniab On the basis of 34 lakhs bales for mill requirements, 27 lakhs hales for extra factory consumption and 3 lakhs bales for export, the annual cotton production target should be 40 lakhs bales This would require between 13 and 20 million acres, on the basis of the highest (120 lbs) and lowest (78 lbs) average yield of lint per aere. Taking a normal yield (100 lbs per acre), the area required would be of the order of 157 million acres against the present acreage of 11 millions and the 1938 39 acreage of 199 millions for the Indian Union alone. The extent of in crease in acreage required could be substantially reduced if simultaneously steps are taken to raise the yield per acre by manuring supplying improved seed and adopting cer tain simple agronomic practices within easy reach of the cultivator It may, however, he stressed that for the success of any cotton plan, it is most essential that remunera the prices for cotton should be ensured to the cultivator, particularly in relation to other competing crops. In this connection, it may be mentioned that as compared with the pre war year, while the prices of foodgrains and oil seeds have risen to nearly 41 and 5 times respectively, coiton prices are only 28 times the pre-war level. This clearly shows that cotton has become a much less attractive crop than other competing crops If cotton production is to be increased in India to the extent desired it is inevitable that there should be a more equitable adjustment of the relative price levels of different crops in line with pre war trends so as to remedy the present unattractive position of cotton

It is realised that any plan for cotton acreage and production should be co-ordinated with and integrated in an

Page 5 xts three



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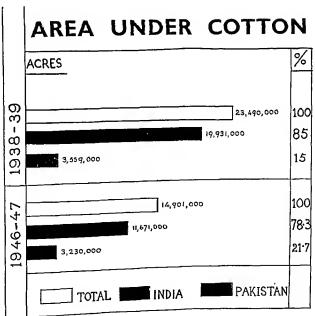
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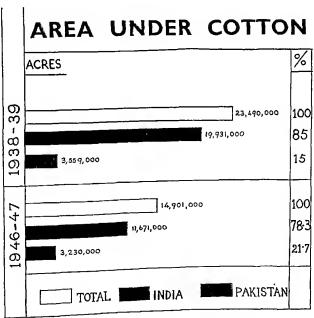
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all India crop plan Indeed this recommendation was made as early as January 1943 and repeated in 1948. It is some satisfaction to note that such a plan is being con sidered by the Ministry of Agriculture at present. The question of increase or decrease of acreage under cotton is not merely one of arithmetic. The relative prices of cotton and other crops come very largely into the picture as shown above. Another very important factor is that of the suitability or otherwise of the soil and climate in various parts of the country for various crops. With this is linked the vital consideration of the rotation of crops with a view to preserving the fertility of the soil It is necessary to point out these considerations, as, at present, in the desire for self sufficiency in food in every Province, the ments of alternative crops in the interest of the country as a whole are likely to be overlooked. For example, it appears to be in the interest of the country to allow Bombay and Madras at present to produce more of the medium and long staple cottons like Vijay, Surti and Cambodias in which

the shortage is most acute and supply them with food produced in other parts of the country like the CP or Madhya Bharat All these and no doubt many other considerations would have to be taken into account before deciding on an integrated plan of crop production in India In the absence of adequate basic data, e.g. of a detailed survey of chemical components of the soil and of the water resources and climatic conditions in the various parts of the country and of the costs of production of various crops under differ ent soil and climatic conditions, one is inclined to ask whether it would not be best to leave the 'Planning" to the free play of economic forces acting through the reaction of supply and demand from millions of producers and consumers Otherwise successful planning of acreage and production schedule of various crops could only be based on a detailed and careful study of the statistical, agronomic and scientific data extending over the whole country for an adequate period of time



all India crop plan Indeed this recommendation was made as early as January 1943 and repeated in 1948. It is some satisfaction to note that such a plan is being con sidered by the Ministry of Agriculture at present. The question of increase or decrease of acreage under cotton is not merely one of arithmetic. The relative prices of cotton and other crops come very largely into the picture as shown above. Another very important factor is that of the suitability or otherwise of the soil and chimate in various parts of the country for various crops With this is linked the vital consideration of the rotation of crops with a view to preserving the fertility of the soil It is necessary to point out these considerations, as, at present, in the desire for self sufficiency in food in every Province, the ments of alternative crops in the interest of the country as a whole are likely to be overlooked. For example, it appears to be in the interest of the country to allow Bombay and Madras at present to produce more of the medium and long staple cottons like Vijay, Surti and Cambodias in which the shortage is most acute and supply them with food pro duced in other parts of the country like the CP or Madhya Bharat All these and no doubt many other considerations would have to be taken into account before deciding on an integrated plan of crop production in India In the absence of adequate basic data, e.g. of a detailed survey of chemical components of the soil and of the water resources and chimatic conditions in the various parts of the country and of the costs of production of various crops under differ ent soil and climatic conditions, one is inclined to ask whether it would not be best to leave the Planning to the free play of economic forces acting through the reaction of supply and demand from millions of producers and consumers Otherwise successful planning of acreage and production schedule of various crops could only be based on a detailed and careful study of the statistical, agronomic and scientific data extending over the whole country for an adequate period of time



COTTON RESOURCES OF INDIA

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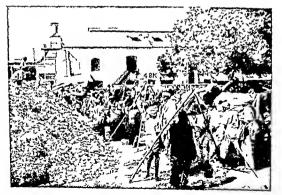
KALIDAS SAWHNLA, M Se., C.A.S.,

Secretary Indian Central Cotton Committee, Bombay

Early History of Cotton in India

COTTON has been grown in India from times imme mortal The discovery of samples of ection materials at Mohenjo-Daro in Sind during the archalogical excass at the first of the state of the centure established that the growing and manufacturing of cetion in the Indias Valley dated as far back as 3000 see Little is known about the varieties grown in ameient times or their distribution, except that the cotton used in the manufacture of the Mohenjo-Daro samples most probably belonged to the arboreum type. The earliest authentic reference to cotton dates back to four hundred and fifty years before Christ, when Herodottis tentified that "India had while trees that hore foeces as their from."

made their dottes. Then we have the excitence of the Roman Instortan Pliny (A D 73) who, referring to the imports of cotton manufactures from India complained the every year India was draining the Roman I impre of a fundated million sesterces, equivalent to sementing like 15 million rupees. In the fluirtenil century, Marco Polo observed that Masulipatam produced the finest and the most beausful cottons to be found in any part of the world." Again it was India's pre-eminence in the manufacture of cotton fabrics which induced the East India Company to come to India with a Reyal Charter, in search of Indian chèro and muslin. In short, the history of India's Irelation of the British in India is the history of India's Irelational Cotton fibres.



WEIGHING
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The all traff so it saided a region ced by hard courter of Messes Lolkart Brotlers

Page Sixty six



MERCHANTS
EXAMINING
QUALITIES
OF
COTTON
SAMPLES

King Cotton in Fighteenth and Ameteenth Centuries

The eighteenth century which witnessed the beginning of the consolidation of British power in India may be said to be the turning point in the cotton economy of Ind a This period also coincided with the Industrial Revolution in Europe The emphasis in In his hegan to shift from the manufacture of cotton fabrics to the production of raw cotton for supply to Britain Various measures were taken by the East India Company from 1788 for the growing of more and better quality cotton. These efforts were con tinued during the nineteenth century Exports to Britain reached their peak during 1866 following the cotton famine resulting from the American Civil War In fact India enjoyed a veritable boom in the raw cotton trade with Britain during the years 1862 to 1866 This boom may also be said to have laid the foundation of India's cotton textile industry as a part of the fortunes then made was invested in the starting of cotton mills in the country Thereafter there was a sethack in the exports of Ind an cotton to Britain but the takings by the rest of Furope viz France Germany, Italy etc increased Apart from this the last quarter of the ninetcenth century witnessed the beginning of a growing demand for raw cotton fir t from Indian mills and then from mills in Japan As a res lt of this the average annual production of cotton in in d vided India (including Burma) increased from I 583 100 bales for the quinquennium ending 1887 83 to 3734000 bales during the quinquennium ending 1906-07 During the same period the average annual exports and mill con sumption increased from 1 307 000 bales and 367 000 bales to 1,928 000 and 1 873 000 biles respectively

Position before, during and immediately after the First World War

The first decade of the present century witnessed a steady increase in the production exports and mill consumption of cotton in India. Roughly half the annual crop was exported and the other half consumed in India. Exports to the United Kingdom ranged from 4 to 8 per cent of the total exports while those to Continental countries formed some 41 to 68 per cent. China and Japan accounted for 2 to 4 per cent and 21 to 37 per cent respectively of the total exports. The position relating to cotton production and trade before, during and after the First World War is indicated below.

	Ave age Anneal,					
Pe ad,	Product on	"Mill con sumpt on	Exports			
1909 1910 to 1913 14 1914 15 to 1917 18 1918 19 to 192 23	4 270 4 374 4 597	9 096† 2 146 9 034	9 614 9 124 2 565			

Includes fore gn cotton. Year ending 30th June

A noteworthy development during this period was the emergence of Japan as an important buyer of Indian cotton from 1909 10 her share of the total exports of cotton from India having risen from 21 per cent in 1903 04 to nearly 50 per cent in 1912 13. This position she retained for nearly thirty years thereafter

Position after 1922 to 1947

With the establishment of the Indian Central Cotton Committee in 1971 and its subsequent incorporation unfer the Indian Cotton Cess Act 1923 considerable stimulus was given not only to the improvement of the marketing



GINNEO
COTTON
BEING
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and manufacture of cotton in India but also to the production of long and medium staple cottons. Special efforts were made to ach eve a balanced production of the different varieties of cotton to meet the internal and export demand. This polory received a great fill p as a result of World War II during which short staple cotton became a drag on the market owing to the complete loss of the European and Far Eastern markets for such cotton. The post on regardsing the improvement of the average staple of the crop is illustrated by the following table—

Production in thousand bales of 400 lbs net.

	Long staple (a & above)	Med om staple (Be ow g & above 11/16 j	Short stap a [11/15 and be ow]	Total All Stap or	
Ave age	-				
19 7	693	1 560	3 176	5 449	
1942-43	130	2 008	1 23 4	4 702	
1943-44	1 489	2 499	1 271	5 259	
1944-45	1 134	1581	86	3 580	
1945-46	897	1 35	9	3 536	
1946 47	878	1 703	93*	3 513	
Average					
1942-47	1 153	1 923	1 041	4 112	

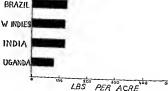
It will be noticed that as a result of a general reduction in the cotton crop from the 1944 55 eason the average crop during the quinquennium ending 1946-47 was some 25% less than the average crop during the years 1992 77 Despite this the production in 1947-47 of long and medium staple cottons was 66 and 27% is given while that of short staple was 10 ver by 67% compare 1 with that in 1927 27

The annual m II consumpt on of In 1 an cotton increased from 2072 000 bales during the quinquennium 1927 77 to 3,971 000 bales during 1947-47 the corresponding a era-c

annual exports being 3505000 and 599000 bales respectively

VIELO OF COTTON PER ACRE

IN VARIOUS COUNTRIES EGYPT PERU USSR ANGELEGYPT SUDAN USA ARGENTINE



Partition and After — Effects of the Partition of

The partition of India on 15th August 1947, resulted in the assignment of the fertile and irrigated territories of Sind and West Punjab to Pakistan In 1946-47, the total area under cotton in Undivided India amounted to 14,901,000 acres, of which the Indian Umon and Pakistan accounted for 11,671,000 and 3,230,000 acres respectively, the corresponding figures for the pie war vear 1933-39 being 23,490,000, 1933,1900 and 3,559,000 acres respectively. Out of the cotton area of Undivided India in 1946-47 and 1938-39, the tracts now included in Pakistan thus accounted for 22 and 15 per cent respectively.

The relatively higher share of Pakistan in the acreage for 1946-47 is due almost wholly to the fact that whereas the Indian Union curtailed a great deal of its cotton area, particularly of short staple varieties during the war, the Pakistan Provinces effected very little reduction Of the area under irrigated cotton in Undivided India in 1938-39 and 1946-47, the territories now included in Pakistan accounted for about four fifths and two thirds respectively

On the basis of the actual crop figures for 1946-47, the Indian Union accounted for 45, 62 and 76° of Undivided Indias production of 99, 215 and 116 lakhs bales under the three staple length groups 7/8° and above 1, below 7/8° and above 11/16" and below respectively. While the Indian Union's share of the total crop of 43 lakhs bales of Undivided India in 1946-47 was only 205 lakhs bales (62%), its mill consumption accounted for 386 lakhs bales (62%), at mill consumption of 394 lakhs bales (198%) of the total mill consumption of 394 lakhs bales). At the level of consumption in 1946-47, the Indian Union was dependent on Pakistán cotton to the extent of 98 lakhs bales (4.2 lakhs bales of staple length 7/8° and above and 56 lakhs bales of staple length 7/8° and above and 56 lakhs bales of staple length below 7/8

and above 11/16") and on other foreign cotton to the extent of 70 lakhs hales (mostly above 1" in staple) Of the total mill consumption of all cottons, 151 lakhs bales were of long staple, 181 lakhs hales of medium staple and 54 lakhs bales short staple

Post-Partition Position

Against the total production of 31.9 lakhs bales of cotton in the Indian Union in 1947 48 on an acreage of 11 millions (when seasonal conditions were exceptionally good), the internal requirements (including extra factory consumption at 27 lakhs bales) amounted to 44.8 lakhs bales, leaving a deficit of 12.9 lakhs bales Out of the production of 10 3 lakhs bales of short staple cotton in 1947-48 the mill and extra factory consumption of such cotton accounted for 80 lakhs bales, leaving a surplus of 2.3 lakhs bales of short staple cotton On the other hand, the deficit under long and medium staple cottons stood at 106 and 46 lakhs bales respectively. This deficit of 152 laklis bales was met by the use of (1) 68 lakhs bales of Pakistan cotton (44 lakhs bales of long staple and 24 lakhs bales of medium staple), (ii) 2.2 laklis bales of medium staple Indian Union cotton from the previous earry-over, and (iii) 6.2 takhs bales of other foreign cotton of long staple

The cotton supply situation became still more tight in 1948-49 owing to a short crop in that season due to un favourable seasonal conductions and the reduced carry-over from which the deficit could be met. It will be seen from the following table showing the figures of estimated supply and distribution of cotton in the Indian Union in 1948-49, together with corresponding tentative estimates for 1949-50, that India will be faced with a very acute cotton situation during the current season.





(Lakhs of bales of 400 lbs gross we ght)

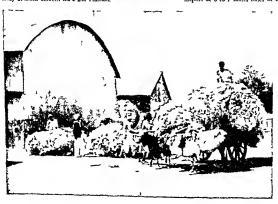
_		1948-49		1919-50	
Δ.	SUPPLIES (i) Estimated carry-over at the begin on ord the season— (g on one of the season— (s) W h mills (a) M an acuton Pakitan cetton Other fores, a colton	11 6 21 20		8.4 16 2.8	
	(b) With trade — Ind an c ton Pak tau (of on O for to a go cotton	12.5 97 66		18 01 0°	
		1 8	29	2.1	147
	() I timated c op of fud so Un on (u) Fet mated rece pts from Pekisten (v) I st mated imports from other to e go contries		%0 3.4 0		263 100
	Total Suight		6 9		610
В	MILL CONSUMPTION Ind an cotton I akintan cotton Other in e.go cotton	31 2 41 72	\$2.5	293 17 90	400
D C	FSTINATED EXTRA FACTORY CQ\SUM! TI \ FSTIMATED F\PORTS		2.7 3.0		°7
	TOTAL OFFE AR		48 2		117
1	ESTIMATED CARRY OVER AT THE END OF THE SEASON; (a) We have the season of	18 01 02 26	147	17 16 53 08 02	63

Resided

** Imports assumed to be negligible in view of the present cur rency develock between Ind a and Pakistan, In the light of the above statistical position the Govern ment of India has recently decided to permit the import of 8 lakhs bales (and if necessary 10 lakhs bales) in the current year. However, the import of such a large quantry of cotton every year without corresponding exposits of cloth is not an economic proposition. The need for in creasing the production of cotton in the Indian Union is therefore imperative and cannot be over-emphasized. The need is all the greater due to the devaluation of the Indian currency and consequent increase in the rupee prices of foreign cotton. From the joint of view of balance of payments position also India an ill afford to spend force in exchange for the purchase of 11 to 12 lakhs bales of cotton per annum.

Possibility of attaining Self sufficiency in regard to Indian Union's Cotton Requirements

The Indian Union's normal annual production of cotton on the present acreage of 11 millions may be placed at 25 lakhs bales of which 45 lakhs bales may be taken as long staple 125 lakhs bales medium staple and the rest short staple. The internal requirements of cotton may be estimated at 427 lakhs bales comprising 155 lakhs bales long staple 199 lakhs bales medium staple and 73 lakhs bales short stayle. If provision is made for a minimum export of 20 lakhs bales of short staple cotton the total requirements of cotton will stand at 447 lakhs bales. This quantity includes some 70 lakhs bales of foreign (other than Pakistan) cottons, which are mostly over 1 in staple and are imported from East Africa Egypt Sudan America etc to meet the requirements of the Indian mill industry Cottons comparable in quality to these varieties are at present produced in India in a very limited quantity, say about 20 000 bales Cambodia/Co 4 (staple length 1 1/16) produced in Madras Province is comparable in quality to the lower styles of East African cotton. As far as can be foreseen now production of such cotton cannot be stepped up appreciably for some time to come. The import of 6 to 7 lakhs bales of cotton from countries other



COTTON ARRIVING AT A FACTORS





than Pakstan will, therefore, have to be continued for some years until as a result of the experimental work now initiated in Madras Province, East Punjab, and Mysore State, suitable varieties of equally good eciton are developed for large seale cultivation in India The dependence on Pakstan, however, cin largely he avoided in the immediate future, it barring a very small quantity, Pakstan cotton can be replaced by increasing the production of similar varieties already in cultivation in the Indian Union

Resources for replacing Cotton imported from Pakistan

For attaining the limited objective of self-sufficiency in India's cotton requirements except in respect of cotton of the types imported at present from countries other than Pakistan, India should plan for producing 40 lakhs bales of cotton per annum, comprising 8.5 lakhs bales of long staple, 220 lakhs bales medium staple and 9,5 lakhs bales short staple Compared to a normal crop on the present acreage, this calls for an increase of 40 lakhs bales under long staple, and 95 lakhs bales under medium staple and 15 lakhs bales under short staple The production of 40 lakhs bales will require an acreage of about 17 millions as against the present acreage of II millions. That the in creased production of these long and medium staple varie ties to the extent required is feasible will be evident from the fact that the peak areas grown with them in recent years were 119% and 83%, respectively, higher than the corresponding areas in 1948-49 However the extension of the area under cotton should be effected only as a last resort in view of the present food position of the country The question of increasing cotton production cannot be treated as an isolated problem. In view of the limited re sources, the expansion of cotton production must form part of a well integrated plan for the increase of pr tion of essential agricultural commodities

Apart from the extension of area, the chief means able for increasing the production of cotton are (i greater use of improved seed and (ii) increasing the per acre of cotton by manuring, extension of urifacilities and adoption of improved agronomic para. The resources available and the extent to which producin be raised under items (i) and (ii) are dealt with low—

(i) Extension of area under improved varietie cotton: The additional yield that may be obtained by ing improved varieties may be estimated at about 5% area covered by improved varieties at present is sli less than half the total area under cotton As imparates are already available for almost all the organism of the contract as not be covered by such varieties in two or three year this is done on the custing area alone by bringing it maning 60 million acres under improved varieties additional production likely to be obtained may be est ed at 60,000 bales

(n) Increasing the yield per acre of cotton by manu extension of irrigation facilities and agronomic pract. The total area under irrigated cotton in the Indian U at present is about 6.6 lakhs acres. The quantity of ar mum sulphate required for manuring this area at 3.6 introgen per acre may be estimated at 44,000 tons additionally yield that may be obtained by manuring urricotton will be about 73,300 bales. Further, ammo sulphate can also be applied to the cotton crop in are assured rainfall as for example, in the Broach and 3 tracts of Bombay and the Karunganni tract of Ma CONTIVILED ON PAGE SEVENTYS 1

n .. c....

(Lakhs of bales of 400 lbs gross weight)

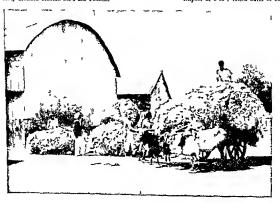
		1948-49		1949-50	_
Α.	SUPPLIES (i) Fet mated carry-over at the be g oning of the season —				
	(a) With m lls — Ind so cuttoo Pakintso cotton Other fora go cottoo	50 116		84 16 26	
		157		126	
	(b) With trade:— Ind an enton Palestan cotton O her fore go cot on	12.5° 117 06		16 01 02	
		1.8	55 2	21	147
	() Estimated c up of Ind an Un on () Fet mated race pts from Pakietan (v) Let mated imports from other		23 0 3,4		263
	fore gn countries	!	70		100
	Total Scip 7		80.0		51 0
В	MILL CONSUMPTION Indian cotton Pakistan cotton Other fore go cotton	31 2 4 1 7	42.5	293 17 00	190
C.	ESTIMATED EXTRA PACTORY				
D	ESTIMATED EXPORTS		30		27
	TOTAL OPETANE		482		417
Ε	ESTIMATED CARRY OVER AT THE END OF THE SEASON (a) With mills				
	Ind an cotton Pak stan cotton	84		17	
	Other fore go cottee	28		36	
		128		53	
	(b) With trade:— Ind an cotton Pak stan cotton Other foreign cotton	18 01 02		01	
		21	247	10	63
_		<u> </u>	<u> — </u>		<u> </u>

*Revised
**Imports assumed to be negligible in view of the present currency deadlock between Ind a and Pakistan

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COTTON
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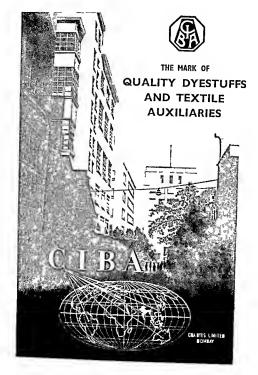


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- (t) Extension of area under improved varieties cotton. The additional yield that may be obtained by so ing improved varieties may be estimated at about 5%. The area covered by improved varieties at present is slight less than half the total area under cotton. As improved varieties are already available for almost all the cott growing tracts there is no reason why the entire area shou not be covered by such varieties in two or three years this is done on the existing area alone by bringing the it manning 60 million acres under improved varieties it additional production likely to be obtained may be estimed at 60000 bales.
- (n) Increasing the yield per acre of cotton by manutine extension of irrigation facilities and agronomic practice. The total area under irrigated cotton in the Indian Unic at present is about 66 lakhs acres. The quantity of amm nums sulphate required for manuting this area at 30 II. of introgen per acre may be estimated at 44 000 tons. The additional yield that may be obtained by minuring irrigate cotton will be about 75,300 bales. Further ammonius sulphate can also be applied to the cotton crop in areas assured rainfall as for example in the Broach and Sur tracts of Bombay, and the karunganni tract of Madra. CONTINUED ON TROSE SURVEYS ESC.



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THE PROGRESS OF TEXTILE CHEMISTRY IN INDIA

By Dr. K. VENKATARANIAN, Ph D. D.Sc (Manc.), F.N.I., F.A.Sc., F.R.I.C Director, Department of Chemical Technology, University of Bombay

THE position occupied by cotton in our agriculture and by cotton textules in our industry indicates the importance of research in this field. When the number and complexity of the mechanical and chemical operations in volved in the conversion of the cotton fibre into a finished fabric are considered, the vastness of the scope of such research is also apparent. However, Indian investigations have so far been limited almost entirely to plant breeding experiments at one end and to work on the chemical processing of textile at the other end, spinning, weaving and other mechanical operations of the cotton industry have received little attention by way of research. A brief survey of some problems of textile chemistry studied in the Deput ment of Chemical Technology, University of flombry, may be of interest to readers of this Centenary Volume.

Cellulosic Changes

Moisture in cotton may be determined volumetrically by treatment with acetic anhydride in a solvent, converting the excess of acetic anhydride into acetanilide and acetic acid, and titrating the total acetic acid the method has some advantages over the oven-drying and azcotropic distillation methods A rapid procedure for determining de gradation in cellulose in terms of the reducing power is to oxidize an alkaline extract with excess of ceric sulphate in sulphuric acid, and estimate the remaining ceric sulphate in the usual manner Tests for distinguishing between hydrocellulose and oxycellulose have been submitted to fresh scrutiny, and the limits of their applicability have been defined. Oxy celluloses of a certain type, in which a secondary alcohole group B—to an aldehyde or carboxyl group has been oxi dized to a carbonyl group, couple with diazonium salts. On the basis of the reducing power, carboyl content, metal affinity and ability to couple with diazonium salts, at least four types of oxycellulose can be distinguished and a mecha nism for the modes of degradation of cellulose can be formulated 1

Examining letico vat dyes and ferrous hwdroude as accelerators of the oxidation of cellulois, it has been shown that the acceleration is mainly conditioned by the difference between the oxidation potential of the accelerating gent and the reduction potential of the accelerating reducing substance. The chemical properties of the oxycelluloises show that the mechanism of accelerated oxidation is much simpler and more consistent than the mechanism of the normal slow oxidation of celluloise. A new and elegant method for the estimation of carboxyl groups in cellulois materials has been evolved. When a mixture of gascous nitrogen perovide and oxygen is used to oxidize celluloise an unexplored mechanism of celluloise de gradation results.

Studies in Bleaching

Studies in bleaching have included the use of chloring gas for continuous desizing of grey cloth, a detailed investigation of kier boiling and bleaching of white and coloured goods, and prevention of colour bleaching during second the physico-chemical behaviour of hydrogen perouds out too and the role of stabilisers in the bleaching operation have been investigated. The influence of neutral salts on the rate of bleaching, both by sodium hypochlorite and hydrogen peroude, has been studied. The rate of bleaching by both agents has been shown to be related to the ovidation potential. The addition of salts increases the bleaching rate and the oxidation potentials.

Studies in Dveing

The structural features of dye molecules which are substantive to cellulose have been examined. The principal forces of cellulose dye attraction are van der Waals forces and hydrogen bonding, electrostatic forces between ionized groups also operate in so far as the hydroxyl groups in cellulose have some tome character. The primary hydroxyl groups in cellulose are mainly concerned in the attachment groups in cellulose are mainly concerned in the attachment

of dyes, but it has to be remembered that the relative sus ceptibility of the primary and secondary alcoholic groups in the celliloise chain to attack by reagents varies with the nature of the reagent and the conditions of the reaction. The importance of the hydrogen bond in dyeing is indicated by the fact that all dyes contain introgen and for oxygen, the availability of the unshared electrons of these atoms in annino, azo, hydroxyl, carbonyl and other groups largely determines the affinity of dyes for cellulose. The substantity of dye is therefore primarily related to the number and strength of the hydrogen bonds in which it can be implicated, but to enable the dye molecules to reach the sites in the cellulose structure at which they can be held, the dye has to fulfill certain requirements of shape and size.

Substantive Dyeing

There is a similarity in form in the space prodels of benzidine and allied groups of dyes and those of the cellulose and cellobiose units, and the substantivity of benzidine dyes has been ascribed to their ensistence in approximately straight the thread like form capable of attachment to the straight chains of the cellulose molecules (Meyer and Mark 1930), but all substantive dye molecules need not be clon gated or thread like in the sense of the benzidine dyes Among dyes of a given type the substantivity increases from the benzene to the naphthalene, anthracene and the more complex polyundear aromatic systems. The older conceptions of substantive dyes must be modified in view of the substantivity of the leave compounds of the anthraquinone vat dyes, and of the arylamides of hydroxynaph those caption alkaline solution.

Azote Dveing

Azorc dyes are the insoluble azo dyes produced on textile fibres by impregnating them with an alkaline solution of a coupling component (Naphtol ' Brenthol ') such as coupling component () applied the antide of 2 hydroxy 3 naphtholic acid and subsequently coupling with a diazonium salt Because of the special nature of the dyeing process, a problem in azoic dyeing is the superficially precipitated pigment which has a prejudi-cial effect on the fastness of the shade, especially to rubbing The factors relevant to rubbing fastness and other aspects of azoic dyes have been studied. Although it is practicable to produce shades of good fastness to rubbing from the less substantive Naphtols, substantivity and rubbing fastness are to some extent inter related it is the azoic dye derived from that portion of the naphthol which is not substantively absorbed, but mechanically retained by the yarn, which is essentially responsible for the rubbing-off effect Soaps and synthetic detergents have a solvent action on organic substan ces sparingly soluble in water, owing to the paraffin chain ions collecting together in fairly large aggregates or micelles in which the organic substance forms a solution (Hartley, Wetting and Detergency, p 153) While the after treatment of azoic dyeings with soap has hitherto been re garded as a process of emulsification of the superficially precipitated axoic pigment, solubilization by the paraffin chain micelles must be assumed to be partially responsible for the action From this point of view, naphthols con taining long paraffin chains have been synthesized so that the resultant azore dye may have increased solubility in soap solutions colloidal character in aqueous alkali was a well marked property of these naphthols , the dyeings from which were characterized by excellent fastness to rubbing In the course of this work, Naphtol AS-S was shown to be the 2 hydroxy 3 naphthoy! derivative of 2 amino-3methoxydibenzofuran, and numerous new 'naphthols' were synthesized in order to study the relation between their chemical constitution, substantivity and the fastness of the azone dves derived from them

Mineral Dyeing

Two Indian patents cover a novel and rapid single bath method of dyeing textiles (animal and cellulosic) with mine ral pigments, particularly mineral khakt. A new method involving the use of cuprammonium hydroxide for finishing purposes is the subject matter of another Indian patent. The results are attractive and the process is particularly use full for fabrics and yaris made completely or partially from short staple Indian cottons. Exhaustive experiments to determine the relation between the viscosity and penetration of starch pastes have been carried out. A relation between the viscosity and the stiffness of finished calico has also been established.

Studies in Fastness of Dyestuffs

There is an important aspect of textile industry in which we in India are still very backward-the fastness of the shades Fastness demands are becoming increasingly stringent in other countries, but we continue to tolerate the use of fugitive or kucha colours, we still employ dyes such as Congo Red and Sulphur Black which have become totally obsolete in England and America Fastness incidentally is an expression of which the full significance is not realized There are broadly two types of fastness properties One is fastness to processing which the dyed fibre may have to undergo before the fin shed fabric is marketed, thus it may be scoured, bleached mercerized, anticreased, shrink proofed, hot calendered The second and from the user's point of view, more important fastness requirements are resistance to the action of light, laundrying, perspiration (which may be acidie or alkaline), rubbing and other agencies to which a textile is liable to be exposed. The stan dardization of fastness is an extremely complex matter, and one or two points may be mentioned in illustration Fast ness refers to a dyed textile (or other coloured substrate) and not to the dye uself The same dye can exhibit very differ ent fastness properties on different fibres, and even on the same fibre according to the depth of the shade and the conditions of dyeing Indigo for instance has much better fastness on wool than it has on cotton the anthraquinone vat dyes which have outstanding fastness on cotton are sur prisingly fugitive on nylon

Fastness to Light

Among fastness properties, fastness to light is of great importance especially in our land of bright sunhine, but we have little knowledge yet of the mechanism of fading, the products of photochemical de gradation, and the photo ensitivity of dies in relation to molecular structure. It is well known that cotton (like other fibres) gradually under goes de gradation and loss of tensile strength by exposure to atmospheric oxygen in presence of direct sunlight. This photochemical ovaluation is greatly accelerated by many yellow and orange vat dyes, some of which have excellent

Page Seventy four

fastness otherwise, some indeed are themselves fast to light, but pass on the energy of light absorption to the cellulose molecule which then decomposes Yellow and orange vat dves for curtains must therefore be chosen with care Fast yellow and orange dyes for cotton free from this defect are available, and die minufacturers have mostly withdrawn the dangerous dyes from the commercial range; however, Catco Yellow 5G, an American equivalent of Cibanone Yellow R, which is the dye of choice for studying the photochemical de graduion of cellulose and was withdrawn by the Ciba Company several years ago, has been recently introduced into India Further, photochemically active lives are still employed for calico printing because of their suitability from the printer's point of view. It is known that oxidations and reductions involving one-electron changes proceed very rapidly, and it is suggested in a paper which will shortly appear in the Proceedings of the Indian Academy of Sciences that the photochemical action of some of the anthraquinone vat dyes is related to resonance stabilization of semiquinone The constitution assigned to Cibanone Yellow R by Fierz David has been shown to be erroneous 12

Surface-Active Compounds

Surface active compounds have become increasingly important in the textile and other industries, and a systema tic study of the chemical constitution of wetting agents to relation to their properties has been made. Using sodium oley! N methyl taurine (Igepon T) as a model, a series of amides of the type R' CO N (R') Ar SO, Na in which R' is an alkyl, R is H or alkyl, and Ar is an arylene residue, were synthesized, and their properties such as wetting power, resistance to hard water and protective colloidal action were studied. The structures were varied so as to determine the effect of such factors as the position of the hydrophilie group, unsaturation in the fatty acid part, molecular weight, alkyl substituents on the amido nitrogen, and the presence of substituents such as chilorine, alkyl or alkoxyl groups in the arylamine. Among the wetting agents from a series of fatty acids (C, -C,), the lauric acid (C12) derivatives usually had the highest wetting power Unsaturation in the aliphatic chain led to decreased wetting power, but increased solubility While in N methyl group was a favourable factor, there was no advantage in increas ing the size of the alkyl group. Increase in molecular weight by the use of naphthylamine sulphonic acids in place of aniline sulphonic acids led to inferior products. Compounds in which the hydrophilic sulphonate group was oriented in the meta position to the carboxyamide group were generally superior to the ortho isomers, which in turn were superior to the para compounds. Among the compounds obtained by substitution in sodium N lauryl and N-oleyl metanilates, the Calkyl and Calkovyl substituted derivatives were better wetting agents than the unsubstituted compounds While introduction of one C-methyl group was advantageous, further methyl groups led to a decrease in wetting power Among the numerous compounds that were synthesized and examined, lauryl p toluidide 2 sodium sul phonate possessed outstanding properties as a wetting agent In addition to the study of the relation between the chemical constitution and properties of surface active compounds, attention was also directed to methods of evaluation of wet ting agents. Thus the apparatus for carrying out the Herbig number determination of wetting power was modi fied The optical methods employed for determining the

calcium soap dispersing power being unsatisfactory, a new and simple volumetric method was developed

Some of the problems I have discussed might appear to be academie, but they are in fact of the greatest technical importance, and it is only by realizing the need for research in the base physics and chemistry of the cotton fibre, and the mechanical and chemical processes to which it is subjected, by captains of our textile industry that the industry can prosper

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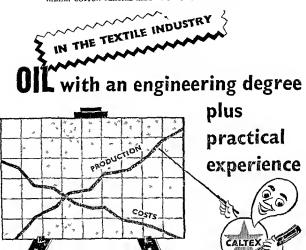
HEAVY CHEMICALS; PESTICIDES; FERTILISERS; PHARMACEUTICS: and LUBRICATION.

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CONTINUED FROM PAGE SEVENTY ONE

For manuring 50 lakhs acres of karunganni cotton and 50 lakhs acres of Broach-Surti cottons at 20 lbs of nitrogen per acre the total quantity of autimonium sulphate required would be 46 000 tons. The additional production that may be obtained by minuring the crop in these two tracts may be estimated at 67 000 bales. It may be mentioned that the cotton grower in India is not as yet fertiliser minded and it would be necessary to demon strate on an extensive scale the advantages of manuring co tom with ammonium sulphate. It will also perhaps be essential to subsidise the use of fertilisers in the initial sizees.

As regards irrigation facilities any appreciable extension of the area under irrigated cotton would not perhips be possible until the major irrigation projects under contemplation or construction are completed. Membride the area under irrigated cotton could be extended to some extent by the provision of minor irrigation works. In this connection it would be necessary to relax in favour of cotton the existing restrictions regarding the use of water from wells constructed with Government assistance for the production of food crops exclusively. The additional production of cotton that may be obtuined by availing of the facilities from minor irrigation works may be computed at, 313, 20 000 bales

Measures for increasing the production of cotton by manuring and by extension of irrigation facilities by the prosision of minor irrigation works necessarily involve large expenditure. A substantial increase in production can be attained without much additional expenditure by the adoption of the following agronomic measures —

- (a) bunding
- (b) early and proper preparation of land in summer
- (c) early sowing

- (d) introducing groundnut in rotation before cotton, and
- (e) inter-cropping

Experiments carried out in the State of Bombay and elsewhere have indicated that bunding can increase the yield of the cotton crop by about 5% As regards early and proper preparation of land and early sowing it may be mentioned that in the case of monsoon crops, the early sowing increases the yield hy about 10 to 15% Similarly, trials conducted in different areas have established that introduction of groundnut in the rotation before cotton increases the yield of cotton by 10 to 15% It is estimated that the cumulative effect of adopting the agronomic measures mentioned at items (a) to (d) above would be to raise the yield by about 25%. The adoption of these im proved agronomic practices is feasible on about four million acres in the States of Bombay Madhya Pradesh Hyderabad and Madras. This will give an additional production of about 2 lakhs bales

Mixed cropping of cotton with groundnut is another measure which can advantageously be adopted to raise the production of cotton, without in any way effecting the production of food crops Even the production of ground nut uself will not be reduced to any appreciable extent if the intererop of cotton does not form any large part of the oilseed crop Experiments conducted in the State of Madras have shown that by sowing one or two rows of cotton after every 8 to 10 rows of groundnut, an average cotton erop can be obtained in addition to the usual production of groundout. In the cotton growing tracts of Madras, Madhya Pradesh Bombay, Saurashtra and Hyderabad such inter-cropping can be adopted over an area of about 15 lakhs acres Cotton varieties suitable for cultivation in these tracts are already available. The additional yield of cotton that may be obtained by adopting inter-eropping on 15 lakhs acres of groundnut may be estimated at about 50 000 bales

SAMPLE ROOM IN A BOMBAN OFFICE

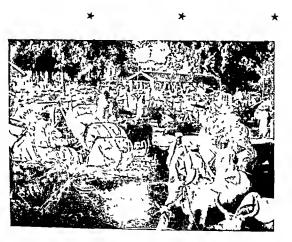


It will be seen that a total additional production of cotton amounting to 45 lakhs bales can be expected by (1) creater use of improved seed (ii) manufing of cotton with ammonium sulphate (iii) extension of irrigation facilities by the provision of minor arrigation works and (ix) in creasing the yield per acre by the adoption of improved a ronomic practices. For producing another 105 laths bales to achieve the target of 40 lakhs bales, it would be necessary to extend the area under cotton by nearly 45 million acres This increase of area can be achieved (1) by utilising fallow culturable waste and weed infest d lands (ii) by utilising a part of the additional area proposed to be brought under irrigation on the completion of the major i rigation projects under construction or contemplation and (11) by diverting some area from other crops mainly oilseeds. Under the Government of Indias scheme for bringing under the plough fallow and cultur able waste and weed infested lands some 6 million acres of land are proposed to be reclaimed in 7 to 8 years. Out of this area about 5 million acres are situated in the cotton growing tracts. Roughly one third of the latter area may be expected to be put under cotton in the normal course of rotation. Further, major irrigation projects under construction or contemplation in the States of Madras Hyderabad East Puniah, Bombay Rajasthan and Madhya Bharat, when completed will add at least 4 to 5 million acres to the area of irrigated crops Nearly 15 to 2 million

acres of this additional area may be expected to be available in due course for the growing of cotton in normal rotation. This would result in an additional production of 0.75 to 1 million bales of good quality cotton. Further, there is also scope for growing improved percrinial types of cotton on waste lands not suitable for food crops, on hill slopes and in _ardens. It is too early to give at this stage, an estimate of the additional production of cotton likely to be obtained from this source but the protential littles are worth closer investigation. It will thus be observed that when all the above measures are taken. In his will be able not only to meet all its own cotton requirements from local resources but will also have some sure fuscional control or events. This will be achieved without diverting any area from food crops to cotton.

Coprinsion

It will be seen from the foregoing that from the longterm aspect, India has vast resources for increasing the production of cotton of the required staples so as to makber self-sufficient in all qualities other than the extra longstaple Egyptians. From the short term aspect. India can become independent of supplies of cotton from Palistan in the immediate future, provided a part of the area originally diverted from cotton to food and other erops is reverted to cotton and adequate supplies or manure are made available at subsdised rates



AN
UP COUNTRY
COTTON
MARKET

starch in order to meet local requirements. The Govern ment of India gave an assurance in 1940 that those indus tries the establishment of which was considered essential under war time conditions, and specified industries which had been promoted with the direct encouragement of Government, would not be left high and dry" and would be protected against unfair competition in the post war period, provided they were run on sound business lines. It was in pursuance of this assurance and Government's desire to see that war time industries did not languish owing to unfair competition in the immediate post war period that the Tariff Board was constituted in November 1945 The claims to protection or assistance of the following war time industries, whose products are required by the textile industry, have been referred to the Tariff Board for investigation

Cotton textile machinery (spinning ring frames, spin ning rings, spindles and plain looms)

Wire healds

Pickers

Starch

Bobbins.

Fluted and tin rollers

Of the foregoing the Board has submitted its report on the first five, and Governments decisions thereon have been announced. I shall prus in brief review the present position and future prospects of these five industries, and in so doing, I shall deal first with the four ancillaries and accessories before coming to the cotton textile machinery industry.

Starch

Until the outbreak of the last war, practically all the requirements for starch in the country were met by imports. Only two factories were then in production. But, due to severe competition from imports, they were finding it difficult to operate successfully. During the war, when imports of starch were curtailed, as many as 45 factories were started for producing starch from different starch bearing materials of which maize and wheat were the principal ones. Most of the factories could function only for short periods as supplies of maize and wheat were in Consequently, the actual production of these factories fell far short of their installed capacity. In 1943, when acute famme conditions prevailed in the country, the Government of India issued the Starch Control Order, prohibiting the production of starch from wheat and fixing the prices of different varieties of starch. The Order was amended in February 1944, so as to bring under control the production and price of maize starch. This resulted in most of the factories being shut down At present, only a few factories are working and, these too partially, and with deteriorated maize as and when supplies are made avail able to them. The acute shortage of raw materials for the starch industry is likely to continue until the food position in the country improves or until adequate supplies of imported maize are made available to the starch factories There are at present 40 factories in different parts of the country Of these, 22 are licensed and 18 are unlicensed It is estimated that nearly a crose of rupees have been invested in this industry

The claim of the starch industry for protection or assis tance was first referred to the interim Tariff Board in November 1945 On the recommendation of that Board, a protective duty of 18 per cent ad calorem was imposed on maize starch for three years ending March 1950 There was no duty on sago flour, which was imported free Sago, tapioca and tapioca flour were subject to a revenue duty of 36 per cent ad valorem (standard) and 24 per cent ad valorem (preferential), while "farina' was subject to a revenue duty of 18 per cent ad valorem. The case of the indigenous starch industry for continuance of protection at an enhanced rate after 31st March 1950, came up for examination before the present Tariff Board in the latter half of 1949, when one of the units represented that the starch industry was facing severe competition from in ported sago flour and that the quantum of protection already granted was inadequate owing to the fact that the cost of production had increased while the price of imported starch was falling

The demand for starch is estimated at between 75,000 and 80 000 tons per annum, against the rated capacity in the country of about 73,000 tons. In view of the cheapness of sago flour as compared with maize starch, the consumption of sago flour by the indigenous cotton textile industry is estimated at about 75 per cent of the total consumption of sizing materials. Nearly all the 40 factories have had to close down because of lack of supplies of maize. The meagre production of maize starch was supplemented in the past by tapioca starch produced on a cottage industry scale Manufacture of tapsoca stareh is understood to have been banned by the Governments of Madras and Travancore Cochin In view of the large demand for stareh in the country, the industry should be enabled to restart production by making available to it adequate quantities of maize, particularly because of the large amount of capital invested in the industry. Meanwhile, the industry has asked for imposition of a duty on sago flour on the basis of its cif price and the fair selling price of indige nous maize starch. On this basis, the duty required to be levied would work out to about Rs 75 per ewi. The Tariff Board was averse to the imposition of such a high rate of duty on sago flour required by the textile industry, espe eadly when most of the starch factorics are not in produc tion But the Board took the view that, since other varie ties of stareh were subject to an import duty, there was no reason why sago flour, now commonly used by textile mills, should be allowed to be unported free of duty Also, the incidence of the duty on sago flour on the total cost of production of cloth was considered by the Board to be negligible The Board, therefore, recommended the imposition of the same rate of duty on imports of sago flour as they recommended on maize starch and faring, namely, 20 per cent ad valorem The Board further considered that even this 20 per cent duty on sago flour would not be ade quate until the starch industry was in a position to meet a substantial portion of the country's demand. It, therefore, recommended that the duty on sago flour should be made protective and remain in force upto 31st March 1952 The operative part of the recommendations of the Board, accepted by Government, is summarised below

 Protection should be extended for a further period of two years ending March 31, 1952

- (11) The protective duty on starch should be raised from 18 to 20 per cent, the duty on farina should be raised from 18 to 20 per cent, its character being changed from revenue to protective, and the duty on sago flour which is at present free, should be protective at the rate of 20 per cent.
- (iii) If the price of maize varies considerably from Rs 10 per maund, the position should be reviewed to revise the quantum of protection

Wire Healds

The case of the ware healds industry was referred to the interim Tariff Board in March 1947, and the present Tariff Board submitted its report in April 1948 Before the war. were healds required for the textile industry were imported from abroad-mostly from Japan and the United Kingdom, and to a small extent from Italy and Switzerland By 1940. imports of wire healds from foreign countries were almost completely stopped and the searcity of this article was acutely felt by the textile industry. A scheme for the production of wire healds was prepared by C J Textile Accessories Works, Bombay, which approached the Textile Directorate for assistance in securing the necessary raw materials Priority was accorded to the firm for importing steel wire from the United Kingdom. The firm was also given facilities for importing tools and machinery for the factory It started production in 1941. The capital invested

by this firm is stated to be Rs 1,84,000. It employs about 60 persons

There are various kinds of wire healds in use in the textile industry The Board's inquiry was limited to wire healds of the most common type, namely, 'twisted eye' wire healds with round or oblong end loops, measuring 9;" or 101" between the end loops, and made from wire of 27 gauge, the loops being 6 mm in size Taking into account the increasing tendency on the part of the cotton mills to switch over from cotton healds to wire healds, provided the latter are of proper quality, the annual demand for wire healds in India is estimated to be 80,000 bundles of 1,000 pieces each Against this demand, the bighest production by the only factory in the country is about 45,000 bundles per annum. On a review of the cost of production of indigenous wire healds, the Board came to the conclusion that a comparison of the estimated fair selling price of the indigenous article with the landed cost of imports without duty, showed that the industry did not stand in need of any protection at present, and that it was open to the industry to approach Government for the institution of a summary inquiry whenever serious competition from imports was apprehended in future. The existing revenue duty of 10 per cent ad valorem was, therefore, maintained The Board, however, recommended that, since healds are essential stores for cotton mills, facilities should be afforded to the manufacturers of wire healds for importing up-to-date machinery and for securing technical personnel from abroad



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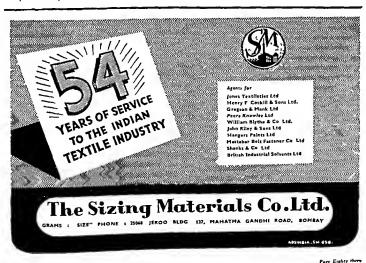
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Pickers

An application made by the Ahmedabad Picker Manu facturers Association for protection or sustance was refer red to the interim Tariff Board in October 1946, and the present Board submitted its report in June 1948. Although the original application referred to pickers used in the cotton textile industry, the scope of the inquiry was subsequently enlarged by inclusion of pickers used in the jute industry also.

Manufacture of pickers in India was started as early as 1914 Available evidence shows that, at the end of the first World War, there were about 40 factories in operation, but only three were able to survive foreign competition in the years following that war and were still in operation in 1939 The outhreak of World War II in 1939, and the consequent stoppage of imports both of pickers and of the most impor tant raw material, buffalo hide, from China and Java. gave fresh impetus to the pickers industry which expanded to meet the large and urgent requirements of the textile industry From a few struggling firms in 1939, the number of factories producing pickers rose to about 60 at the end of 1945, when the total output increased to about 20,000 gross. The paid up capital invested in the picker industry (relating to 60 units) is estimated to be Rs 11,20,000 with about 7,000 employees All the pickers factories, except seven, are located in the Bornbay State and Saurashtra, while nearly 75 per cent of the total production is by factories situated in and around Ahmedabad. The remaining seven factories are situated in Calcutta and eater to the needs of the jute industry. Many of the pickers factories are small units, using local materials and most of them have seasonal production

The bulk of the production of pickers in the country is of standard 4 B round foot pickers used in the cotton textile industry. Other kinds of pickers manufactured are the drop box type used in weaving pattern cloth, and in the nanufacture of jute, woollen silk and rayon. The cost of raw hide constitutes more than 60 per cent of the total cost of production of the picker. Although Indian buildiol hades are available in abundant quantities, they are admittedly inferior to Batavian and Chinese hides. This is attributable to the poor method of curing adopted here. An important by product of the pickers industry which would go to reduce the cost of production of the pickers is glue, produced from the waste cuttings of hides.

The total demand for pickers for cotion textile, jute, silkand woollen industries in 55,000 gross per annum. The rated capacity of the factories working at present is about 50,000 gross. But the actual production is less than onethird of the rated capacity. The quality of the indigenous pickers leaves great rooth for improvement. This can be secured by greater attention to selection and grading of ludes used in the manufacture of pickers, to the length of time for steeping the pickers in oil of the requisite quality, to the type of rivets used and, above all, to workmanship

Although, on comparison of the landed cost, ex duty, of the imported picker with the fair selling price of the indigenous picker, a duty of 4 per cent was found to be sufficient the Tariff Board recommended that the revenue duty of 10 per cent ad inform should be connected into an equivalent protective duty, and that this protective duty should remain in force upto 31st March 1951. The principal reason which weighed with the Board in making this recommendation was that a period of three years was neces sary to enable the industry to stabilise itself.

The pickers industry also offers scope for development on a cottage industry basis, as is the case in various centres in the Bombay State and at Thanghad (Saurashtra). It is essential, however, that small units of production should be properly organised so as to maintain a uniform standard of outsility.

Bobbins

The application for protection of the bobbin industry was referred to the interim Tariff Board in April 1947 and the present Board submitted its report in November 1949 Manufacture of bobbins in the country was undertaken on a small scale during the first world war when imports from the United Kingdom had been cut off. But soon after that war, the indigenous bobbins industry could not survive the serious foreign competition. The industry was revived during the last war when again imports were stopped and when the Indian jute mills approached a few enterprising manufacturers to start production of bobbins in the country and offered to purchase the entire output According to the All India Jute Mill Bobbin Manufacturers Association, Calcutta, there are 21 sute mill hobbin factories in Calcutta with a capacity of about 73,500 gross of bobbins per annum. Another factory has recently been started in Bangalore with a capacity of about 2,500 gross of jute mill bobbins per annum It is reported that Orissa and Madras have one factory each for the manufacture of jute mill bobbins, but no definite information is available. Besides, there are 112 factories producing cotton mill bobbins Information about rated capacity and actual production is avulable only in respect of 47 factories. Their rated capa city is about 4,15,000 gross but actual production in 1947 was about 2,83 000 gross The cotton mill bobbin industry is mainly concentrated in the States of Bombay and Sau rashtra, with a few factories in North, Central and South India It has been stated that at one time there were as many as 500 bobbin factories, large and small, but only a small part of this mushroomlike growth survived after the war The capital invested in the bobbins industry is stated to be Rs 50 lakhs

Largely started and developed during the war, many of the bobbin factories are using improvised machinery and are not equipped with modern kilns for seasoning the tumber Three varieties of indigenous timber, namely, mango , "haldu and "kalam', are suitable for the manufacture of jute mill bobbins After the war, ie since 1946, some of the factories have been using imported birch or beech so as to conform to the standard of imported bobbins which were competing with indigenous bobbins. It is the considered opinion of technical experts that indigenous "haldu' and "kalam" are quite suitable for manu facture of cotton mill bobbins, provided the timber is properly treated. There is an abundant supply of indige nous haldu and kalam from forests in Bombay and Bengal, and, with the gradual improvement of transport facilities, supplies of indigenous tumber should become adequate and regular. If the bobbins industry is to have a stable foundation, it should use indigenous timber as far

as possible Besudes haldu and kalam, other andigenous types of tumber considered sutable for the manufacture of bohbins are "kanju", "baurang", "white cedar", rose wood, walnut, maple, hirch alder, 'bahera', and 'champ' The manufacturers of bobbins should co-operate with the Forest Research Institute, Dehra Dun, in conducting tests regarding the suitability of different kinds of tumber

The annual demand for jute mill bobbins in the country is estimated at 75,000 gross, while that for cotton mill bobbins is put at 450,000 gross per annum. The demand for silk and rayon mill bobbins and that for woolfen milt bobbins is about 5 per cent and 2 per cent respectively, of the number of bobbins required for the cotton mill industry The domestic production of jute mill bobbins may be taken to be 50 per cent of the total consumption of jute mill bob bins in the country. In regard to cotton mill bobbins, the indigenous production was at its highest in 1947, namely, 282,648 gross, which is about two-thirds of the total consumption of cotton mill bobbins in the country. With the installation of improved machinery use of efficient tools and with a more regular supply of timber, indigenous production can be stepped up to meet the entire demand for bobbins in the country

In regard to the quality of indigenous bobburs, the Tranff Board came to the conclusion that the right type of bobburs, both for jute mills and cotton mills, are manufactured by a number of well-equipped factories which use good timber and proper methods of manufacture. On the other hand, there are other factories which are not well equipped and which do not take proper care in selecting and seasoning the timber or in following the correctioning of manufacture. The bobbins industry is still in an early stage of development. Much work remains to be done in carrying out extensive tests on suitable varieties of timber, improvement in methods of treatment and seasoning of the timber, the use of the right type of machinery and tools, and adhering to standard specifications

By analysing the cost of production of indigenous bobbins and by comparing it with the landed cost, without duty, of imported bobbins, the Board concluded that the industry did not require assistance by means of a protective duty. The existing revenue duty of 10 per cent ad valorem remains. The Board, however, recommended that, as the bobbins industry produces an essential accession for two of the major industries in the country, namely, jute mill and cotton mill industries, Government should offer direct assistance to the bobbins industry by way of technical guid ance and supervision, and facilities for the supply of the right type of tumber.

Other textile accessories which are being made in India are reeds, shuttles, picking bands and roller skins, ropes and bandings and chemicals necessary for the dyeing and print ing sections of the textile mills. Precise information in regard to these accessory industries is not available, and it behoves the industries to collect statistics regarding production, sales, capital and labour employed, and other particulars through the Association of Merchants and Manufacturers of Textile Stores and Machinery (India) Bombay. In this respect, Indian industrialists have much to learn from their British counterparts who, in many lines of manufacturers, have produced a census of production.

either voluntarily or have co-operated with the Government in producing such censuses

A remarkable fact which was strongly emphasized during the various inquiries made by the Tariff Board, was the existence of prejudice against indigenous products even on the part of Indian industries Undoubtedly, there are several reasons for such prejudice. Apart from conser vatism, which makes us prone to purchase things which we know and which have been found to be satisfactory, there are long standing trade connections between the manufac turers of consumer goods (e.g. textiles) and manufacturers of accessories and ancillary products, which make it difficult for a change to be effected in the normal routine of stores purchase Even after making allowance for these factors, it cannot be denied that consumers and manufacturers alike have had unfortunate experience in using Indian products. which do not always have a uniform standard and are not of the requisite quality. In several industries, particularly those which have sprung up during war time, the quality of indigenous products has been found to be below that of imported articles. This has been due to several reasons such as lack of suitable machinery, want of trained technicians or skilled labour, or unavailability of proper raw materials. But it must be pointed out that one of the principal reasons of the unsatisfactory quality of textile accessories as of other engineering and chemical products has been the tendency in our country for people to go in for production of articles which sell profitably during a period of scarcity, without adequate attention being paid to the quality of the product A seller's market gives rise to a mushroom growth of factories producing bobbins or pickers as an odd job in which there is hardly any technical competence or even desire to maintain continuous produc tion. Such haphazard growth has tended to bring down the quality of the Indian product and even bring a bad name to the entire industry manufacturing such accessories Consumers of such accessories are often prepared to buy cheap and shoddy things but when offered better indige nous products at higher prices prefer to purchase foreign accessories Indeed, the prejudice in many eases is so deeprooted that there have been instances in which Indian accessories can be passed off by being marked as "Made in United Kingdom" or in some other country, which goes to show that the preference is not so much for intrinsic quality as for the mere name of the product. In many cases, opinion of the consumers, which after all is the final test of the quality of the product, is divided and it becomes necessary for the Tariff Board or any other investigating authority to obtain the opinions of experts who are dis interested and can give a detached view. If the manufacturers of textile accessories desire to develop their indus tries on a sound basis, it can be done only if they are prepared to weed out the mefficient units from their ranks and if they agree, collectively and individually, to formulate and adhere to certain specified standards. The Indian Standards Institution now offers a suitable machinery for evolving specifications for Indian products, and it is impe ratine for manufacturers of textile machinery and accessories to take its assistance in laying down such standards and in conforming to them

Another striking point that has emerged from the inquiries conducted by the Tariff Board into the textile

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accessories industries such as wire healds, pickers and bobbins, is that there has not been sufficient direct contact between manufacturers of such accessories and the textile millowners These accessories and stores are purchased through dealers and middlemen, who, in their turn, procure the cheapest type with regard to their quality. The result of this has been that the textile mills have developed a prejudice against indigenous products even though they are manufactured according to standards. The only effective way in which this prejudice can be overcome as by estab lishing direct contact between manufacturers of textile accessories and textile millowners by grading the factories producing the accessories, so that orders to suit individual requirements of manufacturers can be placed directly with the factories. In this matter, the initiative should be taken by the textile midls and their associations, since they are well-established and are in a position to use indigenous accessories It is not without significance that the cotton textile industry, which has benefited so largely from the Swadeshi movement as well as from measures of protection and State assistance is itself hardly sympathetic to claims for protection to ancillary products such as bobbins, pickers and starch, or even to a basic article like textile machinery. I may recall what a previous Tariff Board observed over eighteen years ago in this connection It stated, the policy of protection results in the development not merely of the industries to which protection is granted, but also of subsidiary industries, it will have failed to achieve its full purpose Every effort should be made by mill owners to encourage the use of Indian materials in their It is the obvious duty of millowners to provide a commensurate return to the country in the form of additional employment for Indian labour and capital * And the objectives of a policy of protection can best be achieved by mutual co-operation between the basic industries and secondary industries

Cotton Textile Machinery Industry

The claim of the eotton textile machinery (ring frames, spinning rings and spindles) industry for protection or assistance was first referred to the interim Tariff Board in July 1946, and the Board submitted its report in April 1947 The Board reported that it was not possible to make a reasonable estimate of costs, because the volume of produc tion achieved by the industry at the time of the inquiry had been very small The Board, therefore, held that the inquiry had proved premature but suggested a fresh inquiry in 1948 The Government of India while accepting this recommendation of the Board, authorised it to hold a fresh inquiry when the industry had attained a sufficient volume of production on the basis of which the costs of production could be assessed. In June 1948, one of the units in the industry represented to Government that imports of foreign looms and parts, which it had been manufacturing, should be restricted and that the matter should be referred to the Tariff Board for investigation. The Government of India recordingly requested the Board to include within its terms of reference the question of protection to looms and parts, along with the main inquiry into the claim to protection or assistance to the cotton textile machinery (spinning rings, ring frames and spindles) industry. The present Board

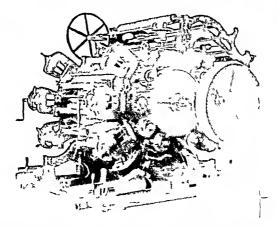
* Report of the Indian Tanif Board on the Cotton Textile Industry (1932)



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submuted its report in October 1949, confining its investigation to (i) spinning ring frames, (ii) spinning rings, (iii) spindles, and (iv) plain looms required for cotton mills Loom parts were evoluded from the puriews of the inquiry, as such parts were not normally made in the country Similarly, dobbies, flanges and yarn beams, which were being produced occasionally, and on an experimental basis, were also evcluded from the terms of reference of the Board

The cotton textile machinery industry in the country at present can be said to comprise four factories engaged in the manufacture of spinning ring frames, rings, spindles and other spares for such frames, and five factories engaged in the production of looms. Of these, one stopped production in 1948. Another factory started the manufacture of dobbies in 1949 Besides the above nine units, two other units are reported to be manufacturing cotton mill looms, but the Tariff Board dul not take these units into account as they did not submit the necessary data to the Board at the time of its investigation last year. The nine units in the industry, for which details are available, have invested approximately Rs 3 crores Three new units which are expected to commence production of textile machinery in the next two years or so, have invested Rs 182 laklis. The number of workers employed in the nine units at present in production is about 3600. One of the three new units has been started in collaboration with the well known firm of Textile Machinery Makers, Ltd., of the United King dom, and another is associated with a firm of machine manufacturers of the United States of America

The puneipal sources of imports of cotton textule machinery during the last three years were the United Kingdom, Igapan the USA and Switzerland In 1949, it was estimated that about 604,900 numbers of spinning machinery (in terms of spindlies) were to be actually delivered in the country from foreign countries. In respect of looms, about 10 000 were imported in the three years 1946-48. Since separate statistics of imports of different eategories of cotton textule machinery are not being maintained at present, at has not been possible to estimate the demand for different kinds of such machinery and the degree of competition offered by imports. In order to rectify this defect, both the interim Tanif Board and the present Board recommended that the statistics of imports of textule machinery should be maintained in detail as specified by them.

The Tanff Board in its Report (1949) estimated the deroand for spindles, spinning frames and plain looms, for replacement and balancing of easisting plaints as well as for new mills coming under the post war expansion scheme, for the next three years, as follows—

-	T	Spindles	Spinning frames	Plain looms
1950		2 50 000	675	5 600
1951		3 50 000	875	5 600
1952		5 00 000	1,250	12 600

The following table shows the rated capacity, actual production in 1948, and the estimated production during the four years 1949 52, in respect of spinning ring frames and looms —

_	Reted capacity	Actual production	Estimated production				
	calegity	į	1943	1910	1052		
Spinn ng ring fremen 101 488 spindtes asch)	392		219	282	345	318	318
Leome .	5 1 00	Ī	2,392	3 600	5 400	5 400	5 400

Thus a large proportion of the requirements of the country will have to be met from imports for some years to come

The Board, after an exhaustive analysis of the costs of production of the various units and of the difficulties en countered by them in obtaining the raw materials required and in the form of prejudice gainst indigenous products, seconimended a scheme of (a) protective duty-cum subsidy in case of spinning rings, spiniles and plain fooms used in the cotton textile industry, and (c) import control in respect of spinning ring frames. The operative part of the recommendations of the Board, accepted and given effect to by Government, is summarised below—

- The cotton textile machinery industry should be protected for a period of three years, ending March 31, 1953 ,
- A protective duty of 10 per cent ad valorem should be imposed on imports of spinning ring frames, spinning rings, spindles and plain looms used in the cotton textile industry,
- (iii) So long as this country is balance of payments position requires import control in respect of machinery, the present import control in respect of cotton spinning ring fitames should be continued, and licences for imports should be issued subject to a monetary ceiling, keeping in view the indigenous demand and production.
- (iv) If and when import control is discontinued a subsidy should be granted to the manufacturers of spinning ring frames,
- (v) A review of the entire scheme of protection should be made towards the end of 1952

The question of affording protection or assistance to the fluted and tin rollers has recently been referred to the Tariff Board which expects to hold its public inquiry into the industry towards the end of 1950

I have already referred to the question of prejudice agunst indigenous products. It is true that industrialists in India have become accustomed to using imported machinery and it roay take time before they get used to the idea of purchasing indigenous machinery. The prejudice is not altogether unjustified, because, in capital goods, durability and precision are far more important than in many consumer goods. Apair from quality, there arises the question of costs. And, I must emphasize that, in the present stage of our industrial evolution when the demand for capital goods is specialised and restricted, it is not possible to expand the base industries to such an extent as to bring about a substantial reduction in the costs of production nor can the industry teater for a world market. In the absence of

specialised machine tool and machinery industries in the country, machinery manufacturers have also to produce several component parts, ancillary products, as well as ugs, fixtures and patterns in their own factories, and this factor tends to augment the costs of production. On the other hand, absence of any important component which has to be imported from abroad tends to hold up the flow of production. These "teething troubles" are inevitable and it is, no doubt, part of the risk of "venture capital" to face and overcome these and other difficulties with such support and assistance as Government can give. But the deve lopment of the textile machinery manufacture will, in the ultimate analysis, depend upon the co-operation of the users of such machinery, namely, the textile industry. The observations of the Tariff Board in 1932 quoted earlier, although they referred to manufacture and consumption of textile accessories, are equally applicable to textile machinery The textile industry, which has grown under the aegis of State protection and developed with the fillip given by the Swadeshi movement, has reciprocal obligations not only to consumers in the country but also to its ancillary and subsidiary industries. The textile machinery manu facturers have on their part to improve the design and quality of their products study and adopt the best technique of production promote standardisation in their methods of manufacture The U k Cotton Industry Working Party went into the question of utilising the available resources for the supply of textile machinery industry with an assured programme of sales to the home market for the coming years on which to organise their production programme The Working Party appointed a separate Machinery Sub-Committee to go into the whole question and particularly to enquire as to whether there was a sufficiently close coordination between textile machinery industry and the users of machinery The Working Party felt that there was a lack of mutual confidence between the two sides and it v as unnecessary to consider which side was to blame for this state of affairs. The important point was that un satisfactory relations existed, which was contrary to the

interests of both industries The Working Party was of the view that there was need for bringing about "a closer form of collaboration between the British textile machinery industry and the British users of their products" and that the juxtaposition of these two great industries should be regarded as a condition which ought to give a special opporturnity to both' Subsequently, the Ministry of Supply appointed a Special Committee under the Chairmanship of Mr Justice Evershed to investigate the textile machinery industry, and one of its findings was that the most effective means of avoiding any deterioration in the quality of British textile machinery was "the restoration of good relations between the home users and makers, the development of mutual enthusiasm' Admittedly, our textile machinery industry is not so developed, but the need for close relations and co-operation with the textile industries is not less. While the textile machinery industry should make every possible endeavour on its part to overcome the conservatism of the users and the prejudice against indigenous machiners, the textile manufacturers should extend their support to an industry whose development is a basic requirement of the country and whose growth they can actively encourage Only by such eo-operation can we have a progressive Indian textile machinery industry working in close proximity to and in collaboration with the Indian textile industry

The manufacture of textile machinery and accessories is a branch of the mechanical engineering industry, and we have to make much headway in imparting technical training to our personnel. For this we can seek and receive technical assistance from foreign countries. But ultimately, we have to depend on our own industrial development and on our own resources, technical and human. Our country has many advantages and great potentialities. Given hard work at all levels and a new spirit of adventure, and provided we do not seek to carry out tasks beyond our physical resources, there is ample scope for development, economic and technical.

Message from

Sir Vithol N. Chondoverker, Chairmon, The Millowners' Association, Bombay,

30th May 1950.

Dear Mr. Gandhi,

I am very pleased to hear that you propose to bring out a special publication to commemorate the first 100 years of the Indian Cotton Textile Industry. You have been a keen observer of men and matters in the Textile Industry, and I have no doubt that the volume will serve as a useful book of reference to those who aspire to acquire first-hand knowledge of the Industry.

I wish you all success.

Yours sincerely, V. N. CHANDAVARKAR.

The Editor, Centenary Volume on Indian Cotton Textile Industry.

COAL

AND THE TEXTILE INDUSTRY

A.D. C. BUIIIIDGL

I T is estimated that the Testile Industry consumes just over two and a quarter million tons of coal per year in its mills and associated factories which figure represent something under δ per cent of India's present coal production.

Cost r. Oil

Over the last two decades, the novitable centrocery has been easily on and, in favour of the latter commodity, it is accepted that one ton of cell fuel is equivalent to two tens of ceal. This led the large group of Alimediladd Mill owners at one stage to examine closely, the question of conversing their machinery to the use of liquid fuel particularly as the belief was held matakenly that the reserve of Indian coal suitable for use in the Cotten Industry were could be the tension of the continued of the reserve of Indian coal more than sufficient but at the then causing prices the Alimediland Mills for instance would have had to find additional finance to the order of some Rs an lakin per year if oil fuel was used intend of coal. Since the period in question World War No II has intercenced to make the procurement of all fuel from abroad even more difficult than before—the resources of India's neighbours contributing only a small pri pation to total world availabilities.

Illie In Cont Prices

It is true that coal prices have risen considerably since the investigation noted above but this trend is common in India today. Moreover, when it is realised that approximately 70 per cent of the cost of raising a ton of coal is directly attributable to labour costs which are controlled by Gimern ment legislation, it will be evident that responsibility for the high cost of this basic natural earnor be phreed entirely on the shoulders of the Mineowners.

I ffect of Devaluation

The devaluation of striling has raised a further problem amongst the oil burning portions of the Textile Industry which but for the fact that nuclionery is usually fartly earth convertible from the use of one type of fael to the other might conceivably cause hardship to the vast number of people employed in one of India's industries

The location of India's main coalfields in Eastern India necessitates payment of a high rate of Railway Freight. It is pleasing to note, however, that the Government in its latest disinflation drive has proposed that Milb rhall be granted a railway freight rebate at the rate of 1232 per cent on all coal supplies.

Coal Besources

Alternative sources of enal are the Central India Coal fields and the developing fields in Narappura which let to the west of the Rancegunge/Jharia area and it is to these areas therefore that the Cotton Indiatry must look in the future for its supplies as, not only will the incidence of freight be less, but there is a mose on the part of the Govern ment of India to problint the itse of certain types of coking coal found in the Jharia field except by the Steel Industry While there can be no sloubt that the other fields have the reserves of coal to compensate for this proposed restriction of Jharia coals, recent legislation particularly by the Bhar Prosincial Government, has joine a long, way towards curtaining the country's ability and withingness to produce more good quality coal.

As was natural the war years imposed a great strain on the Railways and this affected the free movement of coal It is a matter for congratulation to that Administration bowever that the Coal Industry can look back on the last few years of wagon shortages as a situmon that is unlikely

Control-

Another feature of the war years was the setting up of controls on distribution and prices. These controls continue today and in some respects are unwelcome as are all restrictive measures. There was, however, and for that matter still is, the need for fixed selling prices. It is well known that colliery labour is largely agricultural. Their migratory labrits tended to lead them to other, and temporarily more lucrative, employment in war work on return from their agricultural pursuits. From the Government's need to produce more coal arose higher wages and alhed costs in the way of foodstuffs and consumer goods which were made available to the miner and his family. This became the accepted practice and even today, four years after the end of the war, these burdens on the Coal Industry remain. To make coal prices free must therefore react immediately on the welfare of the miners whose occupation is sufficiently luxardous afterdy.

Control over Distribution

The continuance of complete control over distribution is however another matter. The need to ensure that any essential commodity in short supply during an emergency period reaches its right destination with speed and regularity is not disputed. When however the primary causes of the state of emergency have been removed and the reference, in the case of the Coal Industry is to labour, out put and transport, it is difficult to find a good reason for the continuance of Governmental interference with the buyers' inherent right to choose his own source of supply and to obtain from that source the quality of coal best suited to his purpose, unless it is the Government's intention to introduce State Trading.

Nationalisation

State Trading is nothing more nor less than a monopoly against which the world in general has set its face. When this monopoly is exercised, as in one particular case at present, simply to bring income to the State, and in circumstances which must eventually prove to be detrimental to the Coal Industry itself, it is difficult to find any ment in the scheme. Nationalisation or State Trading or whatever name is applied to the process has yet to prove itself more efficient, more profitable or more beneficial to the welfare of a country in the running of a specialised Industry thin the proved methods adorsed in the course of Free Trade

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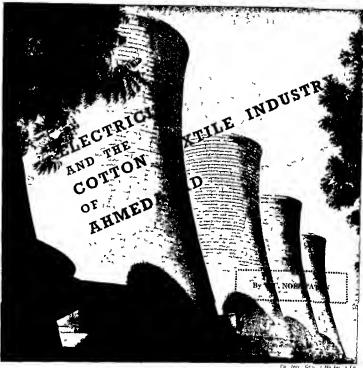
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LICTURESQUE HYPERBOLIC COOLING TOWERS AT THE AMMEDIAND LILICARICITY COME ANY S SABARMATE WORKS

HE Ahmedabad Electricity Company Itd, and the Textile Industry have grown hand in hand, neither could have progressed so rapidly without the other Their steady rise against heavy odds is way beyond the original public expectations

The idea of starting a mill in Ahmedabad first occurred to Sheth Ranchodlal Chhotalal in 1861, the Ahmedabad Electricity Company was established in 1913 Originally people were extremely sceptical and therefore reluctant to invest in either of these ventures because, in the first place

Ahmedabad does not have a suitable climate for spinning cotton, nor is it situated in the centre of a cotton growing area, and secondly, it is not located near any coalfield nor near any source of hydro power However following the lead given by the founder of the first Mill called the Shahpur Mills , other people became interested in this industry seeing that the goods produced by the mill were selling extremely well in India and abroad As against 4 Mills in 1879 there were 27 in 1900, 60 in 1926 78 in 1933, 81 in 1939 and 68 at present a few of them having

been dismaniled on account of worn-out and obsolete machinery. These Mills now employ over one and a halflakhs of workers and at least 75% of the inhabitants of Ahmedabad are dependent on this industry.

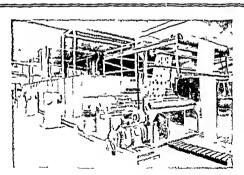
Advantages of Electricity

At present \$8 out of the 68 mills operating or partally running in Ahmeelabad take power from the Company 5 Sipply Lines. This is not unnatural seeing that it is not accepted that the electric drive is the most efficient and sup by from a central source the most economical. The drive is silent in operation and gues constant and rapid turning mostements. Electricity gives steady and efficient light and thin helps production. Flectrical equipment is very economical to maintain. Ropes and massive shafting are climinated and therefore buildings are free from whost tion. With electric power it is possible to balance production by working departmentally, for instance, on holidays, if any department is required to work, it can do so without haung to set the whole mill in operation.

As mentioned earlier 58 mills in Ahmedshad are connected to the Company's lines and it would certainly appear that they are appreciating the great advantages derived from it. Purchased power gives the management more time to concentrate on supervision which is so vital to efficient production. The Electricity Company assures continuity of supply, as it carries standby plant. Purchased power is therefore cheap and at the same time very reliable. The availability of coal and water for bollers is no longer a major problem Cleanlines is improved and power house space set free for process purposes. Because of the up-to-date and modern plant installed by the Company, coal consumption per unit of electricity generated is low, and certainly much lower than what it would have been it every mill operated its own plant so that the consumption of coal in the city per bale of cloth produced is lower than ever before

The high efficiency of the combustion in the Company's Power House means that the Sabarman Chimness are practically smokeless. The result is that the pall of smoke which wied to hang over the city has been very greatly reduced as the coal burned in most Mills is only that required to produce process steam.

In the light of the developments which have taken place during the last 30 years it is interesting to note that when the project was first conceived the sponsors of the Ahmeda bad Electricity Company were petitioned not to descrate the Old World Caty by introducing this new fangled idea It is interesting to contrast this with today 8 in resing demand from mills, factories, agriculture and homes. At the commencement of the Company's operations in 1925, it generated about 2 lakhs units per annum, the daily output now is more than three times that annual figure. At present Mills alone consume 157 million tauts per annum. In 1934 on account of increasing power demands, a stam sation, with 2—3750 KW. Alternator Sets, was opened at Sabarmati. For some years the old Diesel Station at Shahpur was used as a standby and later scripped the building is now used as a Switchhouse and store. This



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PO Box 194 CALCUITA change-over to steam was a landmark in the continued progress of the Company and the City With the coming of steam it was possible substantially to reduce rates and because of the resulting increase in power demand plant extensions have had to be undertaken from time to time with the result that the station now has an installed capacity of 67,500 kW, with another 30 000 kW under erection and expected to come into service in the course of the next 12 months A comprehensive load survey covering all possible potential sources including the Bombay Government's North Gujerat Grid indicates that even when the Station Capacity has reached 97,500 kW it may well fall short of the needs of the area Consequently the Company is contemplating further extensions and to that end has already taken steps to require additional land. It is initially in tended to install 60 000 kW under this la est project of

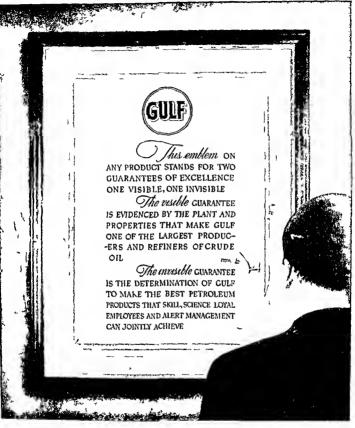
The Company a Power Station is the largest Steam Plant in India save for Calcuta. The property on which the station stands covers many acres of land on the bank of the river Sabarmati. The Station is connected to the BB & CI Railway System by broad gauge stdings. The plant in operation or being installed is 2—3 7.90 kW, 4—7.500 kW and 4—15 500 kW. Generating Sets with 17 water tube boilers having automatic chain grate stokers. Coal unloaded by waggon tipplers is stocked underwater in specially designed silos and is conveyed to the boilers by means of overhead telphers. Water is obtained from tube wells. Circulating water is cooled by a system of hyper bolic cooling towers specially designed for the purpose of which nine are complete and one under construction. It is interes ing to note that this Company was the first to employ such towers in the troptes and the bold step has been amply rewarded. The Station regaintains is sown test.

ing laboratory. It also has a dispensary, canteen school, heary, recreation elub and freilities for housing kev staffs, all of which tend to promote the welfare and well being of the Company's employees.

The Ahmedabad Electricity Company has a creditable record of service to the Textile Industry to maintain and is doing so with plant extension and progressive rate reductions During the years 1932 37 when there was a sharp slump in trade due to foreign competition particularly from Japan, and when cheap and efficient production was not possible with the old and obsolete power plants possessed by most of the Mills the Ahmedabad Electricity Company was of great assistance to the Industry Again in the war years, a number of mills looked to the Company for help when they were threatened with an acute coal shortage. It did not take advantage of the vulnerable position of the Industry during the war but in accordance with its declared policy supplied energy to the mills at attractive rates under easy terms of agreement in spite of the fact that the Company has had to bear the high cost of machinery stores, labour taxation etc., incidental to extending its own plant during and after the war Supply to the Mills would have been much cheaper today had it not been for the present greatly increased cost of plant labour, coal and other requirements of the Company The imposition of Electricity Duty which may be aggravated further by the intended levy of Oetroi Duty by the local authorities adds to the cost of power to the consumer

The Company is quite alive to the fact that the economic and the social well being of the City depend upon the part it can play in its progress. As it kasadone uptongon, the Company, hopes, in the years to Youe, to add since Juild in hand with the Industry which it serves.





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PROFIT TRENDS in the TEXTILE INDUSTRY

M. C. MUNSHI, M.A. (Econ.) (Bon.) Indian Institute of Science, Bangalore

The Metantorphosis

IT is somewhat difficult to describe in precise terms the tremendous change that has come over in the outlook of the general public on the Cotton Textile Industry in India during the last ten years Before the last War, it took the pride of place as the country's first large scale industry of modern times—a premier industry, which, after weathering many a storm (despite its being the ebief victim of the rulers' organized wrath in the shape of the Cotton Excise Duties) had shown the triumph of Indian enterprise and which continued to remind the world of the pristine leadership that India took as a producer of "manufactures" in centuries gone by Besides, with the advent of the first wave of the Swadeshi movement in the beginning of the present century, it enjoyed a peculiar favour in the senti ments of the politician as well as of the average consumer As a result of this, ever since 1927, when the question of fiscal protection came to the fore, the fact that it had been in the field for over sixty years did not prevent the industry from being treated on a par with the "infant industries" of the country

Before the Second World War, in 1936-37, the output of the Industry was estimated at 5,072 million yards valued at Rs 119.51 crores and the annual burden on the consumer worked out at Rs 92 crores so that spread over a population of 370 millions, it gave a per capita burden of As 4 approxi mately While the industry gave to the national produc tion about 13 times this burden

The Advent of War

In a similar way, it is difficult to overemphasize how propitiously the War and its consequent boom came to the rescue of the industry in 1938-39 It has been almost forgotten how both, in the jute and cotton textile industries, the advent of the War lifted them out of a morass of troubles in which they had been sticking almost since the onslaught of the Great Depression. It is true that for the Cotton Industry 1937 and 1938 were years of compara tive prosperity for that decade but by the end of 1938 such factors-as the nervousness engendered by the protracted negotiations for the Indo-British Trade Agreement, the new tax burdens like the Urban Property and Sales taxes in Bombay, the labour troubles, the uncertainty of commodity markets-reversed the irends of the two previous years But after 1939 (to be precise from 1940)—when the industry felt the full impact of the War-there began a period of phenomenal profits and the metamorphosis, to which we have referred above, is to be accounted for by these profits as much as hy the ordeal through which the consumer had had to pass during, and even after, the War The control and rationing-inevitable in a War economy-the sky rocketting prices and the added (artificial) scarcity created by existing stocks going underground, the brazen faced black marketing, the administrative failures of the Controls -even after the end of the War-the decontrol and reim position of controls, the rigging of the market in their favour by a few manufacturers and distributors, the sale of heences and permits and even the sales of controlling or managing powers of mill companies, the "openly secret avoidance of taxes (and the subsequent frantic appeals by the authorities for paying these up) have served only to

¹These estimates are taken from the Golden Jubilee Volume of the Indian Textile Journal (1941) Cotton Textile Industry and the "Consumer" by S G Rao. The figure of 4 as per capita has to be read in relation to 9 pies per capita of the burden of the Salt tax which figured so prominently our freedom struggle

carried from the pockets of the consumers what it filled the coffers of the Government with, so that along with its share in supplying a basic requirement of Defence, it also contributed in no small measure to the Exchequer

Secondly, 1943 must be regarded as the peak year of the War taking all the six items of the table into account We need only recall by way of explanation that it was in the middle of that year that the Government openly (and rather suddenly) accepted the fact of inflation and the need for controlling it and later in the year promulgated the Cotton Cloth and Yarn (Control) Order It will also be noted that the ratio of net profit to capital employed is the highest during this period in 1943

Dividends also reach their high water mark in 1943 A very satisfactory feature of this War period has been that in contrast with the First World War, the industry did not squander its net earnings in the form of dividends. On the other hand, as the table of the percentages shows, the cotton mills went on building up substantial reserves It may be observed in passing that this trend is in marked contrast with those shown by the jute and coal industries during the same period. Towards the end of the War this building up of reserves led to the adoption of a policy of capitalising them by the issue of Bonus shares and we shall have to note this feature more particularly in the years that followed the close of the War

Production and Prices

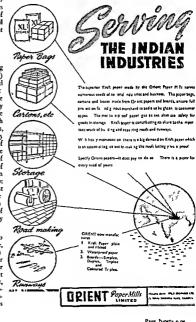
The table on Production and Prices must be read along with the phenomenal rise in the figures for sales (in value) for it will then be seen how, inspite of a stationary-and sometimes even a declining-trend in quantum of produc tion, there is a continuous-and from 1943-a very steep rise in the sales index number. This explains the inflationary tendencies of the period, and the woeful scarcities that were so vividly dramatised in the cloth markets-the cloth famine to which we have already referred. Two things, however, need to be emphasized here. While the scarcity conditions certainly account for the rise in the prices of cloth, the net profits of the mills are explained by the wide margin left to the spinner as compared with the price of raw cotton Between the end of 1940 and the middle of 1943 whereas the index number of prices of raw cotton advanced from 120 to 261, that for cotton manufactures rose from 117 to 513 It has been estimated that even in August 1943 the profit margin in 20 s jarn was 10 as per lb, 1e about Rs 500 per eandy in terms of cotton Is it any won der then that under these scarcity conditions the prices of cotton varn and cloth set up a full fledged inflationary pattern for other commodities to follow?

Students of war finance have now generally come to accept the theory that beyond a certain inflationary stage. even the 100 per cent E.P.T ceases to exercise any antiinflationary effect. The financial conditions in India after 1943 bear ample testimony to this generalisation. Another observation rhat needs to be made is that a closed market -and an assured market-for any quality of the product, created such monopoly conditions that a stickler to phraseology in economics would argue that it would be doing violence to language if we described the gains during this period as profits-that we can only call them monopoly

gains. We have referred to this, however briefly, because it enables us to understand-if not appreciate-the opposi tion that came from various quarters of the industry to the Dividends Limitation Ordinance (in 1947) as an antiinflationary measure

Depreciation

But all this story of upward trends (in the order of their magnitude) of (1) Provision for Taxation, (2) Net Profits (3) Reserves, (4) Managing Agents' Remuneration, (5) Dividends, and (6) Sales, changes its bright bues when we turn to another important aspect of mill finance ciation Refore 1940 as the gross earnings were low, the provision for depreciation as percentages of press profits was extremely steady (more than 40 per cent) Thereafter because of the steep rise in earnings, one can understand a proportionate fall in this ratio, but after 1942, there was



worse is that the decisions of Tribunals appointed to adjud cate on these disputes are unrealistic and injurious to banking system

Every banking office even though branch of a bank should be considered as a separate operating unit. It is no use confusing the capacity of a branch to pay with the capacity of the whole institution. Why should a bank open a branch if it cannot stand on its own legs and meet its expenses? But when aid of law is invoked to increase expenses of an office beyond its capacity to pay then the obvious result would be that banks would decide to close down such offices. And what is perhaps still worse from the point of country's economy is that they would not venture to open new offices. The policy of the Labour Ministry in regard to employer-employee relations in banks must be fundamentally revised if banking is to develop It is an urgent need of the country to quickly witlen bank ing facilities so that the country's economy may develop But this cannot happen as long as the present labour policy continues in operation against banks

India though historically an old country is still an infant in the field of modern business methods and modern bank ing. We cannot afford to have experiments during our infancy which may imperil our very existence. A child has t depen i upon nourishment and observance of well estab-I slie I principles of growth The conomic history of every country shows that in its early stages it I ad no impediments or lundrances of the types that are sought to be put upon our enterprises at the present moment. The best thing for India would be to eschew for the present experiments in economic democracy and allow the country to build suffi

cient strength and resources. Attempts at giving new directions to social questions should only be attempted after we have reached a fairly advanced stage in our national economy Any other course would mean delay in the ful filment of economic ambitions and perhaps disaster in the bargain

Planning Commission and Credit Institutions

The Planning Commission recently constituted under the Chairmanship of our Prime Minister must devote early attention to the banking and monetary organization of the country Credit is the primary need of every economic enterprise. Unless it is geared to meet increasing demand of our proposed expanding economy there may be many disappointments leading to bickerings and frustration

It is therefore very necessary in national interests to seek the advice and aid of the country's bankers. They are patriotic people and willing to help to their utmost extent But their very occupation makes them conservative and cautious They are face to face with the realities of ecoi omie life and the frailties of human nature which quickly succumbs to loopholes in security and weakness in afe guards Ideas and ideals howsoever praiseworthy in theory cannot always be practicable in the field of existing con h tions A banker by temperament and training takes an objective view of questions and is therefore eminently fitted to help the country on realistic lines in its economic plans He of course cannot be a party to wild goose schemes He is shy and reserved and shuns publicity But these qualities are sources of strength and add to the value of his opinion and advice. The Planning Commission must enlist his active aid ماسا المكالية الما الما الما الموالية ا

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THE manufacture of textiles is India's oldest and greatest industry, but it is fundamental to the economy of this country that the raw material should be an indigenous product. Yet the position in respect of raw cotton supply is rapidly deteriorating. Since 1945, India has spent 162 coros of rupees on imported cotton; estimates for the current year (1950) indicate imports on an increased scale, 45 coroses of rupees have already been allocated for the import of American cotton.

The present production of raw cotton amounts to 26 lakhs bales, whereas the demand is estimated to be 47 lakhs bales. Much enthusiasm but little practical success has been achieved in the eatingsign for increased cotton production. To increase cotton production would be comparatively simple, if it were not for the fact that India is also deficient in food production. In 1949, India spent 150 crores of rupees on imported food, 41 crores from dollar areas. It is further estimated that due to India's expanding popula ton, food consumption must grow annually by 400 thousand tons It is, therefore, no longer a question whether to grow food or cotton, but a simple fact that India cannot produce a sufficiency of either

Agraran reform is obviously necessary, but there is httle indication of a realistic plan. From time to time, enthul saims develop over extensive irrigation projects, large scale production of fertilizers or deep ploughing view, however, will hold that there is no single remedy and no short cut to the solution of this problem. Well coordinated complementary reforms are needed to increase the acreage under eulivation, and to raise the production per acre, it is necessary to introduce irrigation, fertilizers, compost and chemical, forestation, deep ploughing, reform

of the land tenure system, improved seeds and enlightened husbandry. These reforms are indivisible. It has fre quently been warned that, taken singly, they might bring more harm than good Agrarian reform must, therefore, be considered as an essentially long term plan. Twenty years would not be too long for even partial realisation. Alternatively the malthusian check would inevitably adjust the population of India to its food supply, but foresight and planning must replace lainer faire.

Man-made Fibres ; a Substitute

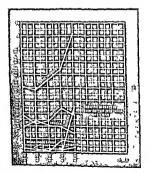
It is suggested that the problems confronting the textile industry should be examined in the foregoing context. Can India continue to spend enormous sums on imported food and cotton? It is patent that she cannot for many years achieve self-sufficiency by exploitation of her agricultural resources What then should be the answer? Human and animal sustenance must be derived from the soil, but in the realm of textiles, nature gives place to the laboratory-man made fibres are firmly established and are used by spinners in every known system. The prime expedient should be to produce man made fibres in India, thus to effect an annual saving of at least 40 crores of rupees. This would provide a raw material for India's greatest industry, a raw material not competitive, but complementary to indigenous cotton It would, furthermore, introduce a new industry finding work for thousands of people contributing in large theasure to the economic well being of the country

A conservative estimate would place India's net cotton deficit at 8 lakhs bales per annium. The cost of imports to replace this deficit amounts to at least 60 crores of rupees. The man made fibre most eminently suited to fill this gap. is viscose staple fibre and it would be possible to establish production units at the main textile centres capable of producing the annual requirement of 135 thousand tons. This in terms of staple fibre production amounts to 400 tons per day and twenty 20-ton production units should be established as suitable centres, each centre being allocated production units in direct ratio to its off take

A plan is required the object being to achieve self sufficiency in textile fibres. Based upon the requirement of 400 tons per-day, twenty production units should be installed and this could be achieved in five years. The foreign currency required for implementation of such a plan would amount to little more than one years expenditure on imported cotton. Thus over a period of five years 20 per cent of the annual expenditure on cotton devoted to the import of capital goods would render this country independent of raw fibre imports. By this means India would make a great step towards economic self-sufficiency and constructive planning would take the place of temporary expedients.

Importance of Staple Fibre in World Textiles

Although this scheme would be regarded as a bold step in Indian industry it is to be emphasized that there is nothing revolutionary in the introduction of stable fibre Viscose staple fibre is now firmly established in Europe and USA as a raw material in its own right. In Lancashire two million spindles are permanently engaged in spinning staple fibre It is also used with great success by the York shire woollen and worsted manufacturers, the jute manu facturers of Dundee and the flar spinners of Belfast. The United Kingdom consumes 130 tons of staple fibre each day and every endeavour is being made to increase production In the USA the greatest cotton growing country in the world its rise in popularity is even more impressive from 18 thousand tons in 1938 to 118 thousand tons in 1948 Germany during World War II produced 900 tons of staple fibre per day Her people were clothed in staple fibre and



her army wore staple fibre shirts tunics and great coats Without this man made fibre the Allied blockade would have brought Germany to submission much earlier

Staple filtre is now recognised as the cheapest and most versatile textile fibre available. Fabrics ranging from fine shirtings to heavy pile carpets are now made from this raw material.

Staple Fibre in India

This year India celebrates the centenary of her greatest industry. In the past hundred years India has developed the largest textile industry in the world. The time would be fitting for the inauguration of a staple fibre industry to augment the supply of natural fibres and to form an essential adjunct to the textile industry. In the manufacture and use of synthetics India is far behind Europe, USA and Japan but her ultimate needs are very much greater.

Staple fibre is not entirely new in India, certain mills have used it with great success, although at it import has been exceedly restricted. Notwithstanding high import duty, staple fibre is available today at a pince lower than any imported cotton. The present purpose is to suggest a constructive plan and in so doing it is important to see this raw material in correct relation to the Indian textile industry. The fact that Europe and America finds it highly satisfies tory and India to date has used so little, is evidence only of restrictive controls not of any unsuitability in the raw material. Unferticed import of styple fibre can at best only be regarded as a temporary expedient. India must produce her own man made fibres.

Based upon the present cost of raw materials and present capitalisation, staple fibre could be produced in India to sell at Rs 910 per caudy. It must also be noted that this is a raw material capable of spinning from 10s to 100s counts and that the waste, with efficient spinning is not more than 3 per cent.

The practical use of Staple Fibre

Staple fibre can be processed over normal cotton spinning machinery with only minor modifications These roodifica tions tend to a simplification of the process particularly in the preparatory stages Staple fibre is delivered to mills perfectly clean and entirely regular in staple length. Conse quently there is no dirt or short fibres to be eliminated. It can again be used in blends with cotton wool or silk Staple fibre union fabrics are particularly attractive and service able. In combination with cotton the particular qualities of both fibres are asserted. The dry strength of staple fibre is usually greater than cotton but it loses 40 per cent of its strength on wetting. The wet strength may be increased considerably by blending with cotton. On the other hand a strong staple fibre is now available with a wet strength almost equal to that of cotton and a dry strength consider ably greater Staple fibre can be produced in almost any combination of staple length and fineness according to the requirements of the spinner. It is also produced as spun In this ease the liquid viscose is pigmented prior dved to extrusion and in this manner an attractive range of entirely fast and regular colours is available. This presents great possibilities for the production of embroidery yarns and loom finished fabrics particularly suited to many dis tricts of India where dveing and finishing is an undeveloped art

Technical and Financial Aspects

It is frequently complained that India lacks the technical skill to implement a project of this type. However, the great advantage in this proposal is that United Kingdom plant and machinery suppliers would undertake responsibility for supplying the entire plant and full technical assistance in the start up and running of the factories. Skilled technicrius from the United Lingdom and the Continent of Europe would be supplied to instruct Indian personnel in the manufacture and processing of staple fibre Attached to the project would be a central pool of technicians ready to be called upon hy any cotton mill using staple fibre and recouring instruction or guidance in its best application

Another great advantage is that a scheme such as this may be accepted in whole or in part. Each plant may be designed as an integral unit and the units could be installed progressively over any reasonable period of time.

In these days of retrenchment and curtailment of industrial enterprise a proposal such as this may be acclaimed with enthusiasism but the question of finance immediately arises. It is not within our present province to suggest how public or private capital should be canalised. The significant fact however remains that India is spending each year on imported cotton sufficient to finance the whole project and if the will and determination to succeed in economic adversity is there ways and means can be provided.

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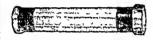
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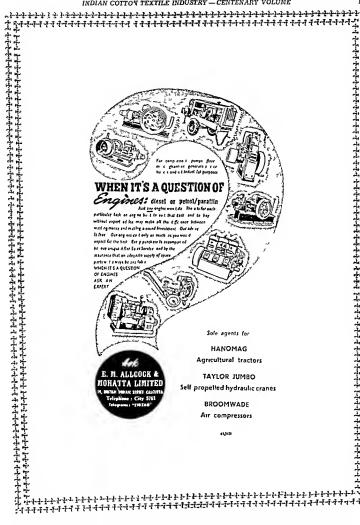
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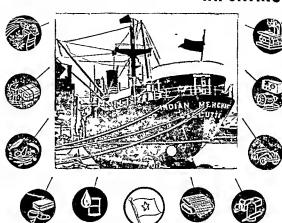
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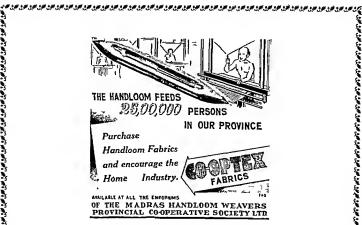
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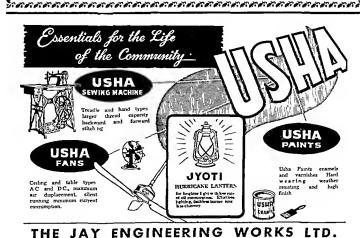
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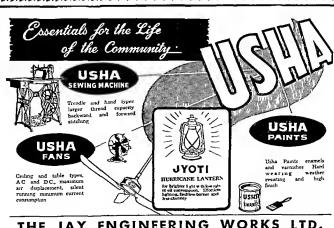
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LABOUR in the INDIAN COTTON TEXTILE INDUSTRY

(Specially Contributed)

THE Cotton Textile Industry is one of the biggest and most important industries of our country Judged from the point of view of employment, capital investment, production and general economic condition, the industry occupies really a foremost place in the economic structure of our country It gives employment to nearly of million workers, as will be seen from the following table which gives average daily number of workers employed in cotton millis according to States

Average daily number of workers employed in cotton mills in Indian Dominion in 1948/49 according to States

			•
	State.		Average daily sumber of workers employed.
Bombay			403408
Amor-Merwara	_		5 971
Bibar		,	1 739
M. P and Becar			37840
Delhi	_	1	13 9#3
Madras		_	86 176
17 P			59 157
West Bengal	_	1	31 758
Panjab	-		3 236
		Total	643 951

The above figures relate to 1948-49, and the latest employ ment position will show perhaps a little shrinkage. At any rate, the Indian Cotton Mill Industry is employing at least six million workers at different centres.

Recruitment

The methods of recruitment are being continuously im proved and in Bombay, Ahmedabad and Sholapur a Decasualisation Scheme has been introduced by the Govern ment of Bombay, under which a Central Exchange for securing the necessary supply of workers to the Industry at these centres has been functioning. The managements of mills are not allowed to recruit workers directly, but bhate to submit requisitions to the Manager, Decaulaisation Scheme, who maintains a register of persons who have already worked in the Industry and who are seeking employment. It is important to note that crude and corrupt methods have now thoroughly been discarded as far as the important centres of Cotton Mill Industry are concerned, and every effort is being made to solve the recruitment problem by introducing Central Labour Exchange.

Shift Working

A large number of mills in Bombay, Ahmedahad Shola pur, Kanpur and other centres work more than one shift, and some of them are working a third shift partially in some of its sections—normally spinning—in order to balance the yarn production to the requirements of weaving. In Bom bay, there is a regular system of change-over of shifts and a worker who its working in the second shift in a particular mouth, is transferred on to the first shift in the succeeding mouth. The usual timings are so adjusted that the second shift closes by about 1 p.m. so that workers get natural sleep during the major part of the night

Absenteersm

The statistics of absenteesim have been compiled by the Labour Department of the Government of Bombay, and by Labour Departments of some of the other State Governments. They are usually published in the monthly issues of the Labour Gazette and similar publications of other State Governments. The following table gives the annual aver

Page Hundred and th rteen

INDIAN COTTON TEXTILE INDUSTRY - CENTENARY VOLUME

age percentage of absenteeism at important centres of the Cotton Mill Industry --

	Bombay	Ahmeds	St olapur	Madrae	Madura	Coim* ator	Kanpur
1916-Averege	142	74	2011	21 0	16.0	12.8	12.9
1947-Average	144	6 4	191	10.3	147	13.8	16 1
1948 Average	132	6.0	189	92	14.5	105	16.4

The latest figures of monthly absenteeism are set out

(Day Shift)

Jenuary	1949				11.08
February			-	1	13,93
March			-		14 61
April		-		1	1459
May					15.59
Jane		-	-	1	16 17
July		-	-	;	15.01
Asgue				1	14 34
September			-	1	14.01
Databar		-		1	15,75
Agrember					24 58
December		-	-	-1	34 45
				Aferage	14 66
	1950				13.73
Jeneary			-	1	11.33
Petruery				- 1	13 8 t

Earnings

The following table shows the trend of average annual earnings of cotton mill workers in India —

Industry 1939 1940 1841 1943 1944 1945 1946 1947 1948

Cotton Re 320.1 325.1 3436 6816 7722 7234 7218 9093 1994 6

Duning the last 2½ teats minimum wages and schemes of Stanlanlisation of Wages have been introduced in Bom bay, Ahmedabad, Sholapur, Khandesh, CP and Berar centres of the cotton mill industry. The following table shows the minimum wages haved for workers at different centres of the cotton mill industry in the country

Ce	M n mum Wage						
Bombay Abmedabad Nadiad Sholayer Abandab CP sod Berar Breach Madras and other centres in the State of	}	-	-	Rs.	30 fo 29 25	r 26 days	
Madrae Viramgem Barei I okak Habb Gadag	}		-		24-8 21 9	-	

The average bane earnings of all the workers at some of the important centres are as follows --

Centres	-	(exc)usive o	e mou	thly pers	eguaras alloweda	
Bembay	1	Ra.	4110	r 26	daye	_
Abmedahad	į	**	42 33			
Sholapur Shandesh	-1		37	:		

Dearness Allowance

The quantum of dearness allowance paid to cotton mill workers at different centres, differs very widely. In Ahme dabad, Rs 65 to 70 has been the level of dearness allowance pand during the last 12 months, while in Bombay, it was between Rs 50 to 55 Sholapur workers are getting almost the same dearness allowance as Bombay workers Textile centres in Gujerat are paying about 90 per eent of Ahmeda bad dearness allowance. The level of dearness allowance paid to workers in Khandesh has been in the neighbourhood of Rs 45 to 48 during the past six months It is important to note that in all the important centres, the dearness allowance has been linked up with the cost of living index series compiled by the Government of Bombay and other State Governments In the case of Bombay, the dearness allowance is paid in order to neutralise 90 per cent of the minimum wage, 1 e Rs 30, for rise in the cost of living index subsequent to August 1939 The corresponding figures for Ahmedabad is 100 per cent neutralisation on the basis of the Ahmedabad cost of living index number, while in the case of Sholapur, the neutralisation percentage is 66 2 3rds

Bonns

In addition to wages and dearness allowance, the workers in cotton textile mills in all the centres have been getting bonus every year, either as a result of collective bargaining or an Award of the Industrial Court or Industrial Tribunal Till the year 1945, the Millowners' Association had volun tarily been granting bonus to workers employed in cotton textile mills in the City of Bombay For the year 1948, workers in cotton textile mills in Bombay and Ahmedabad, got 4½ months' basic wages as bonus. The bonus for workers in Bombay in 1949 was 2 months' basic wages as the gross profits of the industry declined

Size and Composition of Workers' Families

Several family budget investigations have been under taken by the Government of India, as well as by State Governments. The Labour Bureau of the Government of India, no collaboration with the Labour Department of State Governments have recently published family budget reports of enquines conducted during 1943-44 in about 25 important industrial centres. The following table will show the average size and composition of families of cutton mill workers in important extents in Bombay, MP. & Berrar and Delh.—

	Number of perfemily to the City	Eorgers	Depen dante	Average No. of de- pendents hring away from the family	Total of col 2 and col 4
	1 1	3	3	1 4 1	5
Bombay State :					
1 Abmedahed	1 4 35	1 55	277	0 45	4.81
2, Bombay	3.91	1 53	241	0 69	4.65
3. Jalgaon	3.58	166	3.92	0.07	65
4 Shotaper	5.39	1 85	3.54	614	5 53
M. P & Berers				,	200
I Akole	5 OR	184	3.24	0.06	5.11
2 Jabbalpore	4.06	1 66	240	0.73	4. 9
Delhi	3,80	1 34	2,46	0.69	4 45

Message from the President of the Federation of Indian Chambers of Commerce and Industry . . .

I am glad to learn that Mr. M. P. Gandhi is bringing out this year an illustrated volume of the Indian Cotton Textile Industry Annual to celebrate the first Centenary of this industry. He has been rendering a valuable service by publishing the Annuals which have helped the development of this industry to a good extent by making available detailed and authentic information on all its aspects. I hope this Centenary Volume will help its readers in making a correct assessment of the present position of this industry which has grown to its existing dimensions through the efforts of the Indian industrialists even in the face of heavy odds. I wish Mr. Gandhi all success in this laudable effort.

From the Deputy Chairman, National Planning Commission . . .

For many decades I have been connected with the textile workers of Ahmedabad and of other centres of the textile industry. During this period I have had to deal with numerous problems concerning both the workers and the industry. There were frequent occasions in the past when I found it necessary to refer to your Annual publication. I am sure it has rendered useful help to many others interested in the conditions and problems of the textile industry. The idea of bringing out a Centenary Volume is very welcome indeed. It is bound to bring together a wealth of information on the subject of the textile industry which will be of interest end help to a large number of people

G. L. NANDA.

Legislation affecting Indian Cotton Mill Workers

The following Acts apply to cotton mill workers in India

- 1 The Factories Act, 1948
- 2 The Indian Trade Unions Act, 1926
- 3 The Industrial Disputes Act, 1947
- 4 The Workmen's Compensation Act, 1923
- 5 The Industrial Employment (Standing Orders)
 Act, 1946
- 6 The Employees' State Insurance Act, 1948
- 7 The Bombay Industrial Relations Act, 1947
- 8 The Maternity Benefit Acts in several States

The Factories Act, 1948, is modelled on similar legislation prevailing in Great Britain, and is an all round improvement over the Factories Act of 1934. This Act applies to all factories wherein ten or more workers are working with the aid of power, or wherein 20 or more workers are working without the aid of power. Under the Act, every factory is required to secure a licence. The provisions regarding health and safety have been made more stringent, and the employers are required to provide canteens, dining sheds and rest rooms for the benefit of the workers The provi sions relating to holidays with pay have been liberalised and under the present provisions, workers are entitled to 15 days leave with wages on certain conditions. The Indus trial Disputes Act and the Bombay Industrial Relations Act, prescribe machinery for settlement of disputes and the Industrial Employment (Standing Orders) Act provides for settlement of Standing Orders to regulate the day to-day relations between management and men The Employees State Insurance Act, which was passed in the year 1948, has not been brought into force as yet, but when it is brought into force, it will replace the Workmen's Compensation Act. and the Provincial Maternity Benefit Acts This enactment secures for the workers, sickness, disablement and maternity benefits

Classification of Workers

The classification of workers in the cotton mill industry is governed by Standing Orders particularly in centres in Bombay State. There are five classes as follows.

- 1 Permanent
- 2 Temporary
- 3 Badlı
- 4 Probationary
- 5 Apprentice

Under the Standing Orders, permanent operatives are entitled to 14 days notice or 13 days wages in heir of notice at the time of discharge, while no notice is required in the case of other classes of workers. The badh or substitute workers are employed to fill in casual or permanent vacances among permanent workers. The number of substitutes to be employed depends upon the percentage of substitutes to be employed depends upon the percentage of substitutes to be employed depends upon the percentage of substitutes. Bombay, started what is known as Badili Control System?, since 1935, with the object of decasualising such labour. The system has been introduced in all the Bombay Mills and has worked well.

Appointment of Lahour Officers

Almost all the mills in Bombay have appointed Labour Officers to look after labour matters in the mills These officers are in charge of recruitment of labour, and the grievances of workers are also looked into by them. They are in charge of welfare activates of the mill and represent the mills in all the proceedings under the Bombay Industrial Relations Act.

Apprentice Schemes

There are two kinds of apprentices that are entertained in the mills (1) those trained in the apprentice training scheme of the Bombay Social Service League, and (ii) those trained in the apprentice training scheme of the Govern ment of Bombay. This latter scheme was introduced about 10 years ago. The Social Service League's Textile Technical School is conducting both pre-employment and post employment training courses. Some of the mills have their own Schemes, particularly for training weavers.

Welfare Work

A large number of mills are carrying on welfare work for the benefic of their work people. All the mills in Boin bay have their own dispensaries, mill ereches, and grain shops. All the workers have registered their ration, cards with the mill grain shop, which supplies not only rationed foodgrains, but also other articles of food and articles such as soap, kerosene, coconint oil, etc. The prices are fixed

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by the Millowners' Association for the article every month All the mill gram-shops sell different articles at a price fixed by the Association. All the mills have employed full time or part time Medical Officers and in a few cases, Medical Officers in charge of dispensaries also visit the workers in their dwellings. The other items of welfare activities carried on by mills are sports clubs, Gymnasiums, Labraries, Lateracy classes, etc.

Co-operative Movement amongst Cotton Mill Workers

The Bombay centre has given a lead to the Co-operative Movement among the cotton mill workers. There are over 40 Co-operative Societies in different mills and 80,000 workers are members thereof. The paid up capital is in the neighbourhood of Rs 50 lakhs and the deposits amount to nearly Rs 13 lakhs. No progress has so far been made in branches of the Co-operative Movement other than credit societies, and proposals are being made to start Consumers' Co-operative Societies in the near future.

Trade Unious

Trade Unions have been established in the Cotton Mill Industry since 1918, when the first union was organised in Bombay Cit. The Trade Union Movement had a chequer ed career and has recently assumed certain proportions. During 1948, as many as 4 lakhs of workers were members of 200 unions in the Textde Industry in India.

Industrial Disputes

The following figures give the number of industrial disputes, number of workers involved, and the number of man days lost during 1949 in the cotton mill industry in India month by month —

Mon	th	No. of disputes	No. of workers unvolved	No. of man days
January	Total	17	24,192	332 641
February		22	31,593	226,233
March		17	14,538	50 419
April		12	10,669	146,423
May		19	14,729	184,531
June		21	26,708	227,233
July		40	77,393	237,063
August		22	39,157	283,146
September		10	4 487	100,155
October		16	20,967	213 190
November		18	21,563	132,773
December		24	27,989	250,533

Cotton, Wool and Silk Industry

_	3 nar	No. of Disputes	١	Yo of workers involved	No. of men-days
	1946 1946 1947 1943	128 231 631 671 393	1	15;836 296 463 1051 231 978 405 494 259	19 55 344 11 49 686 52 93 932 73 98 039 37 48 551

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ACCIDENT	1	٠	•	,,	4,00,000

1947

FIRE		-		-	Rs	28,00,000	
MARINE			-		**	7,00,000	
ACCIDEN'	г					5.00.000	

1948

FIRE	٠	•	•	Кs	30,00,000	
MARINE				,,	5,00,000	
ACCIDENT	ľ			**	7,00,000	

1919

FIRE			-		Rs	34,71,000
MARINE		•	-	-	,,	7,11,000
ACCIDENT	•		_	_		8 04 000

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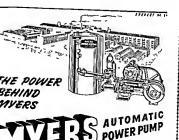
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HANDLOOM INDUSTRY ININDIA

By Dr. B. V. NARAYANASWAMY NAIDU, MA, PhD, B Com, Bar at Law

Role of Cottage Industries

ME are today living under a regime of planned economy all over the world But economic plan ners of our country are faced with three sets of alternatives -nationalisation v private enterprise, central r provincial or regional planning, and large scale t cottage industries The right path in each of these sets is, of course, the golden mean. There must be a bealthy development of both large scale and small scale industries. The spheres of these industries must be distinct, they must be complementary and not competitive. The place of cottage industry in the economie development of the country has been well realised by the government in power and the development of cottage industries, like the handloom, side by side with the mill industry has been officially recognised as one of the object tives of its industrial policy A Cottage Industries Board comprising of representatives of the Union Government. States and some organisations of cottage industries has also been set up by Government with a view to advising and assisting Government on the organisation and development of cottage industries The Honble Dr Syama Presad Mookerice, lately Minister for Industry and Supply, enunciating the industrial policy of the Government in 1948 expressed the view that 'cottage and small scale industries have a very important role in the national economy, offer ing as they do scope for individual village or co-operative enterprise, and means for the rehabilitation of displaced persons These industries are particularly suited for the better utilisation of local resources and for the achievement

of local self sufficiency in respect of certain types of essential consumer goods like food cloth and agricultural implements."

Ancient Handloom Industry

Among the cottage industries of India, the liandloom industry is easily the country's largest and best organised one Long before Egypt blossomed into Cotton, India had built up a tradition for centuries in this respect and indeed, she is the birth place of cotton manufacture Written records show that the mushins of Daeca, the Cali coes and chintzes from Masulipatam and other places on the Coromandal Coast and the gold and silver wefts from Ahmedabad and Banaras were the envy of the trading world Indian textile products had always been wonderful things of beauty, coveted by the envisized countries of the ancient world like Egypt, Greece and Rome Even during the middle ages and the early modern period, the fineness of Indian handloom fabrics was the wonder of the western ers and these fabrics were ranked with the best works of art The large volume of international commerce in hand loom fabrics of India earried on from very ancient times to the beginning of the nineteenth century is too well known to need elaboration here. South India, specially, had a monopoly in the Madris handkerchiefs exported to Africa and Kailies exported not only to the other provinces in this country but also 10 Ceylon and Burma The lungis were equally famous in the overseas market even in modern times

TABLE I

Exports of Madras Handkerchiefs, Shawls, Lungis and
Sarts from India
(1920) 1930)

	1	Isdees Hand Shawls (No.	ikerch efs and in mill on)	Lueges and Sat a (In milion yards)	
Yesr		Madras.	Atl India.	Madras,	All India.
19.0 21	<u> </u>	20	26	20 5	219
1925 28	-	2.9	32	31 4	23 4
1930-31	1	2.6	2.5	192	20.8
1930 36	Ì	0.8	08	193	113
1933-39		06	06	112	12.9

Decline of the Handloom Industry in India

But the machine age sounded the death knell of India's excellence and mastery in the cotton world. The Indus trial Revolution in England and the progressive tightening of the channels of trade in Calicoes and cotton cloth by the sovernment in that country led to a rapid decline of the The Suez Canal, the locomotive and industry in India the automatic shuttle conspired to hamstring India's hand loom industry. Within the country, the markets were mundated with cheap mill made cloth produced on mass production basis in the western countries and, suffering under the cut throat competition from this cheap stuff, the har dioom cloth even upto the present day has not recovered from the breach made in its market. The patronage of the courts also vanished with the disappearance of independent darbars and the middle classes took to the occidental mode of dress which needed hardly any handloom fabric. The change in sartorial habits effected by the middle classes gradually spread to the poorer income groups with the consequence of still further reducing the capacity of the home market to absorb handloom cloth

There was not for a long time any senous competition between the Indian mills and handlooms, rather the relationship between them was complementary In the beginning the greater part of the varn produced in the Indian mills was either sold to the handlooms, or exported (mainly to China) and only a small part was woven in the mills But World War I changed the position. Due to cessation of imports and the stimulus of war time demand, Indian mills themselves began using more of their varia leaving very little for the handlooms The consumption of yarn in mills increased from 74 million lbs in 1896-97 to 817 million lbs in 1938-39 and that of hundlooms from 185 to 425 8 million lbs The proportion of mill consump tion to handloom consumption had risen from 40% in 1896-97 to 1917% in 1938 39 The mill consumption was less than half that of handlooms in 1896-97 but in 1938 39 it was double that of handlooms. During the period, the mill consumption had increased by 11 nmes while that of handlooms increased by only 2.3 times

The decline of the industry can further be evidenced by the full in the number of workers engaged in the industry dwinding of wages to a ridiculously low level and the low exports of special fabries like Madras handkerchiefs and shawls as can be seen from Table I. The quantity of cloth produced on the handlooms has also not kept pace with that of mil production. The table below gives the number of workers engaged in both the mills and the handloom industry (1901.31).—

TABLE II

Workers in Cotton Spinning, Weaving and Sewing
(in thousands)

Year	Workers in Cotton Mills (Spg & Wvg)	Remainder (Handloom ladgetry)
1900	172 9	3297
1911	230 8	29 ~ 1
1921	332 2	2 407 3
1931	\$3.5	2 113 5

The proportion of mill workers to that of handloom workers has increased in the past three decades from 5%, in 1991 to 187%, in 1991. While the number of workers in Cotton mills has increased by 228% the number of workers in the hundloom industry has decreased by about 356° Between 1900-01 and 1938-39 while the production of cloth on handlooms had increased from 646.4 million yards to 1,703.2 million yards, the production in mills rose from 420.6 million yards to 3,905.3 million yards This means that during the period while the production on handlooms

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BRANCHES AND AGENCIES THROUGHOUT INDIA increased by only 263 times, production in mills has increased by 9.27 times. The mill production in 1900 01 was only 651% of handloom production whereas it formed 229.3% of liandloom production in 1938 39

The wages earned in an industry is the true index of the prosperity of the industry The Tariff Board (1932) remarked. Since the handloom weaver cannot regulate his production according to the state of the market without risking starvation for himself and his family, the true cri terion for judging the position of the handloom industry is not the proportion of the quantity of cloth woven on hand looms to the total production but the wages earned by the handloom weaver Judged hy this test, his position on the evidence we have received must be regarded with some There was an all round fall in the wages, and consequently in the earnings of the weaver, before World War II In Belgaum the wages of the weaver per day fell from Re 1-8-0 in 1929 to Re 0-12-0 in 1932, in Dhulia it fell from Re 1-4-0 in 1927 to Re 0-4-0 in 1931, in Blungar from Rs 3-8-0 in 1927 to Re 0-8-0 in 1938 and in Malegaon from Re 0-14-0 in 1927 to Re 0 4-0 in 1938. The well known handloom centres in Madras were also similarly affected

During this period, the overseas market enjoyed by the Indian handloom weaver was also curtailed by the competi-tion of mill products from India and abroad. The exports of Madras handkerchiefs and shawls (as will be seen in Table 1) fell from 26 million in 1920-21 to 06 million in 1938-39 In other words, India's income from this item fell to nearly a fourth of what it was in 1920-21 Not only the growth of the mill industry and the change in the dress ing habits of the people but also the rise and rapid growth of the swadeshi movement hastened the decline of the handloom industry which was mainly dependent on foreign yarn Mr Kasturbhai Lalhliai giving evidence before the Tariff Board in 1932 stated that the ills of the hand loom weaver were not due so much to the import duty on yarn as to the "great Swadeshi movement which has come over the country and which hampers him from marketing his goods from the imported yarn Thus, as Mr R D Bell properly observed, the handlooms were finally beaten and not only beaten but probably severely empled for the time being

Present Position

Thanks to World War II, the Industry once again got a fillip due to the overall shortage But inadequate supply of yarn was a stumbling block to the real prosperity of the industry Added to this, the existence of innumerable middlemen deprived the actual weaver of the benefits of the rising demand leading to a better price Scarcity of raw material on the one hand and organisational defects on the other kept the weavers miserable even during the first half of World War II

However, the introduction of controlled distribution of yarn to the actual weavers and the spread of the co-operative movement put the weavers in a better position and they began slowly to get out of the clutches of the master weavers These factors have had a favourable effect on the general level of wages in the industry which showed rapid signs of rising. In Madras where the writer had an opportunity to enquire into the labour conditions in hand loom industry in 1947, he found a stupendous rise in wages between 1940 and 1947 But the rise in wage rates was not uniform in all the places wages of some fabrics rose by about 11 times but that of others between 3 and 6 times only Thus it will be found that the prosperity of the indus try was not shared to the same extent by all classes of weavers. Those engaged in the manufacture of special fabrics earned much more than their confreres. In short, the prosperity too was localised

Importance of the Industry

World War II revived the handloom industry in India, it was indeed a turning point in the history of the hand loom industry. The importance of the industry in the economic set up of our country is evident from the large number of people engaged in, and the still larger number of people dependent on it for their livelihood. The Fact Finding Committee (Handloom and Mills) had esturated the total number of looms at 2 million, of which 17 million are active. The total number of weavers including auxiliary workers is 6 million and the total number of people depen dent on the industry is 10 million. The production in 1946-47 was as high as 1,270 million yards. In spite of the fact that the cotton mill industry is well established while the handloom industry is still disorganised production of handlooms forms 1/3rd of the total mill production and it accounted for nearly 26% of the total cloth consumption in the country in 1946-47 Against 6 lakhs of workers engaged in the cotton spinning and weaving factories the hand loom industry provides employment for as many as 24 laklis of people or 4/5ths of those engaged in the cotton textile industry

Decline of the Industry in other Countries

The spurt given to the industry by the global war should not however, make us complacent. The handloom industry is the largest single industry which affords employment to a large number of people When decentralized production has become the order of the day due to military and strategic reasons, it would be folly to allow the decay of this industry which is ideally suited for decentralized production. Left to itself the industry will perhaps be reduced to the posi

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non of a small handieraft concentrating on the production of a few speciality cloths. In Japan the small scale, industry of which is often glorified between 1923 and 1934 the number of handlooms engaged in the production of cotton cloth fell from about 150 000 to about 55000. In that country, wherever handlooms are used for cloth production, they are only used for producing pattern goods for home consumption. In countries like the USA the few handlooms that survive are confined to the production of speciality goods like upholstery cloths, stable inten, etc.

Concentration of the Industry

The industry, though widely scattered all over India, is heavily concentrated in a few provinces. The concentration of the industry is set out in the table below.

TABLE III
Number of Looms and Workers in 1940

Province Arram Bengal Bombay Madras		Ashawa	Number	Total number	
		pare extend	u!	dependent on	
		and extend	dependents,	the industry	
Bengal Bombay		411 018 181 019 183 390 294 101 227 935 182 930 108 7 8	1 933 954 363,057 303 900 832 303 631 835 574,870 3 6 325	1 611 072 454,0°6 413 °00 1 176 404 909 180 771 560 435 100	

Assum run's first in the number of looms and weavers, and Madras and Pumph rank second and third respectively. These three States alone have about 10 lasks of looms and recount for 50% of the total number of looms in the country. As regards concentration of the industry, these three provinces are more or less equally well situated but in the production of exportable fabrics, Madras plans a predominant role. Particularly in the export of Madras handker chiefs, it has got a monopoly.

Problems of the Handloom Industry

The problems confronting the handloom industry in our townry relate mandly to the provision of raw materials, organisational set up, marketing and commercial intelligence service and the meeting of competition from millingence service and the meeting of competition from milling and adversities the handloom industry has survived the competition from milli. Reorganisation of the industry rationalisation of production and the provision of better marketing facilities will put the industry on a sounder footing.

Yarn Supply

From the time the Indian mills began consuming their yars for wearing the handlooms were handleapped in respect of the supply of their raw materials. Due to the protection of the cotton mill industry the price of imported yarn to the handlooms increased and Indian mill yarn was

*Also v de M P Gandhi a Indian Handloom Industry Annual" (19 0)

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not available because it was consumed by the mills them selves Even if Indian mill yarn was available, the price by the time it reached the weaver after passing through the chain of middlemen, was high. The mills thus had an initial advantage over the handlooms Supply of varn in adequate quantities and at a reasonable and cheap price is a sine qua non of the growth and development of the industry To achieve this end, it is desirable that there must be not only more and more production of Indian yarn but there should also be a lowering of the price by the elimi nation of middlemen from the distributive channel. The co-operative movement alone can eliminate the chain of middlemen, or at least reduce their number to a considerable extent As the price of yarn is a major item in their cost of production, forming nearly 50 to 60% the lowering of the price will help the handloom products against the com petition of the mills

Middlemen in the Industry

The organisation of the industry is beset with a large number of middlemen, in the supply of yarn, in the production of cloth and in the marketing of the finished product we find a series of middlemen. Before an independent weaver takes charge of his yarn, it passes through a number of middlemen like the wholesaler, retailer master weaver etc. The existence of master weavers in the industry who supply the yarn and pay the wages has reduced the weaver to the position of a wage earner Just as any other manual labourer the weaver gets his wage, which is very low in view of the skilled nature of his work and the ever present fear of frequent unemployment due to scarcity of yarn

Organisational set up in the Madras State

The organisation of the handloom industry in the Madras State takes numerous forms of which four are important In the first and the most predominant form the indepen dent weaver is the central figure. He owns his loom and other smaller instruments of production, buys yarn and raw

materials directly and pursues, in general, his trade as an independent craftsman. He sells the finished product in the open market He bears all the risks due to fluctuations in prices of yarn and eloth. His earning is proportional to his efficiency as a weaver and a businessman

In the second type of organisation the master weaver is the central figure. He supplies yarn and other materials to a group of weavers working under him and collects the eloth woven by them and sells the cloth in the best market he can choose. The weavers working under him are paid only wages at specified rates, their earnings are not affect ed by changing market conditions They run no risk, nor do they reap any profir even when conditions are extremely favourable. In most cases, the master weaver happens to be a cloth merchant as well These master weavers may well stand comparison with the clothiers of 18th century England The weavers employed by the master weavers in this State take the cloth woven to their masters and get from them yarn, etc These weavers are found to be working at home, either with their own looms or those hired out by the master weavers or their agents

The factory system is the third type of organisation The West Coast is the home and the stronghold of the factory system While big factories employing hundreds of weavers are few in number in this region, it is filled with small ones employing five to ten weavers

Co operative Movement

The weavers co-operative society for production and/or sale is the fourth type of organisation, it has become popular in recent years. The Societies distribute yarn to the members. The members of the society are paid pre-deter mined wages and the cloth is taken by the society and sold durect to dealers and consumers. Although this is the general method of organisation some variations do occur such as the selling of yarn at cost price to the mem bers and buying the cloth woven. The purchase price of cloth is arrived at by adding the wages bill to the cost of yarn. The progress made by the co-operative movement in

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21 392 SPINDLES

571 LOOMS

YARN COUNTS - 1144, 204, 284, 324, 364 CLOTH SHIRTING DHOTIES SARFES JAGANNATHI CHADDARS DRILLS DOSUTIES the Madras State in forming weavers' co-operative societies and bringing weavers into their fold is striking. The number of societies has increased from 174 in 1938. 39 to 893 in 1947-48. From about 9,766 in 1941. 42, the number of looms in the societies had risen to 133 199 in 1947-48 or by nearly 13 times. The paid up share capital in 1947-48 was Rs 62 20 lakhs against Rs 1 27 lakhs in 1939-40. The rapid progress made by the co-operative movement in Madras may be seen from the table below.—

TABLE IV

Weavers' Co-operative Societies in Madras

Partiquiars.	1945 46	1946 47	t947 48
Number of Soc eties Yumber of mombers Number of looms Poid up Share Capital (Re, lakks) Value of Cloth produced Value of Cloth produced	336	639	893
	65 286	103 8°5	132 965
	39 452	85,531	133 199
	2100	38.73	6 20
	347 69	423 91	565.19
	373 19	456 54	814 15

Due to the vigorous drive by the Co-operative Department and the introduction of yarn ration cards large numbers of dependent weavers have left their master weavers and have become members of the co-operative societies or set them selves up as independent weavers. This transformation from dependent to independent status has been accelerated during the war period by the unusually heavy demand for and high prices of handloom products. During this period the problem of marketing ceased to exist. During an enquiry, it was found that between the period 1941 and 1947, the percentage of independent weavers and weavers of the co-operative society to the total increased while that of the dependent weavers fell. The following table gives the position in Madras State.—

TABLE V
Proportion of the different classes of Weavers (Madras)

	19	41	1947		
Class of Weavers	Number	Per-	Number	Per-	
Independant Wasvers	118 763	25.0	61 521	16.9	
Dependent Weavers	256 530	60.0	33 234	292	
Coolin Wasvarn	31 218	8.0	19 199	116	
Weavers of the Co operative Soc ety	17 108	4,0	11 95.	93	
Total	437 716	1000	130 209	1800	

The favourable was time factors have encouraged the dependent weavers to get out of the clutches of the master weavers. This is therefore, the best time to launch a drive to bring the weavers under the co-operative fold and eliminate the middlemen.

Marketing

The difficulty of marketing has been responsible for the perpetuation of the class of middlemen Financially

empled and ignorant of the methods of marketing, weavers of humble means fall an easy prey to the matter weavers Lack, of publicity and propaganda in foreign countries has been a grave defect in the entire export trade in handloom products. There is no agency to safeguard the special interests of the handloom industry in the foreign markets or to study problems in relation to the export trade at present. The export trade is left wholly to the mercy of extraneous forces. It is the duty of the Government in the interest of the industry to require the exporters to adhere to certain approved specifications. Lack of standardisation has been responsible for confining the marketing of handloom products to 'spot transactions.

To promote the export trade of our handloom products, the services of the Indian Trade Commissioners and similar official agencies abroad might be utilised to develop the various markets by means of extensive propaganda, main renance of nuiseums of handloom products in the consuming centres, etc.

Research

Yet another problem of the industry is that of Research While the organised textile industry has schemes for setting up research unstitutes on the model of the Shulley Institute of Manchester with the assistance of funds collected under the Cotton Textiles Fund and contributions made by the industrialists, and a few like the Ahmedahad Textile Industries Research Association have actually been formed, the need for a separate research institute for the handloom industry does not seem to have received any senious attention. It is hardly necessary to emphasize that research in regard to handloom production has definitely to be directed on different lines than research regarding the organised industry. Finances required for such an institute would be comparatively small and it should not be difficult for the Government to provide the necessary funds.

Mill Competition

Lastly the vexatious problem of competition with mills These two hands of the textile industry are absolutely essen tial for the country's economic prosperity. At least in cer tain fabrics, the monopoly of the handloom cannot be given up for some decades to come. The traditional conservatism of Indian women in sartorial habits, particularly as regards the surce, may be depended upon to ensure a continuous flow of demand for handloom sarees The exportable fabrics like Madras handkerchiefs lungis, Kailies furnishing fabrics etc will always play an important role in the preservation of this industry. No doubt the mills are now producing and selling cheaply some fabrics similar to those produced on handlooms. But still the average villager goes in for the handloom stuff for he has an implicit faith in the durability of the cloth and buys it in spite of its prohibitive price. Both the mill and the handloom have a great many interests to safeguard and what is required to make their interests much more compuble is careful planning Of late there has been a natural adjustment between their spheres of activity and by deliber are direction this can be made more complete and fruitful

The writer would suggest frequent conferences of the mill and handloom interests under the auspices of the Govern ment, which would pase the way for a fuller understanding between them and for an amicable settlement of differences With a rationalised ilematection of the spheres the hand loom industry and the mill industry can be complementary, particularly in the production of coloured fabrics and speci ality fabrics.

The handloom industry has survived the storm of competition and will survive. The question is whether it will survive as a relic of primitive economy, a symbol of sweating and low standard of living or whether it will survive and grow strong as the corner stone of a healthy, decentralised modern economy which will maintain in free dom millions of families on a reasonable standard of comfort, while ensuring to the population at large a steady supply of clothing even at times of possible insecurity The industry has got to be maintained to meet one of the basic needs of human life. The effects of the deterioration of the industry may not be felt as much in its production aspect as in the unhappiness and misery it would cause to a class which is highly skilled. A certain amount of mutual adjustment is bound to revive the industry in all its ancient glory The handloom weavers who have already achieved wonders in the age of machinery once observed Sir Alfred Chatterton an eminent Director of Industries, Madras will be able to turn the tables on the powerloom if hut a fraction of the capital energy and organisation were devoted to their trade that have been expended in pushing powerlooms. Though one may not share the tobust optimism of Chatterton one can be sure that if instead of talking much about the mill competition, the handloom industry devotes more attention to marketing and other organisational problems it will go a long way not only in stabilising the industry but also in contributing to the econo me prosperity of the country. The problems of the hand loom industry are hydra headed. What is needed is a corrective inside the industry so as to place the industry on

APPENDIX I Cotton Yarn consumed and Cloth produced in Indian Mills

	and Handlooms							
Tear		Cotton cloth produced in mils (a m l tou 1 de	Yarn available to handlooms (s m ll on lbe)	Cloth produced on haudiooms (to m li on yards)				
	2	3		. 8				
1 1990 21 1991-03 1992-03 1993-04 1993	85 100 100 100 100 100 100 100 100 100 10	5 400 5 7 600 7 7 600 5 7 600 7 7 600 7 7 600 7 7 600 7 7 7 7 7	100 6 200 8 200 20 201 4 201 4 201 4 201 4 201 4 201 6 201 6 201 6 201 7	6 45.4 4 527.2 300.18 1 101.2 1 101.1				
1938 39	817	3 905.3	4258	1 703 2				
1949 50	1,360	3 905	350 D	1 400				

The convers on of yarn into cloth has been made on the bas s of the cld ratios is 1 to yarn - 4 yards cloth (in the case of hand looms) and 1 h yarn = 478 yards cloth (in that of mulls)

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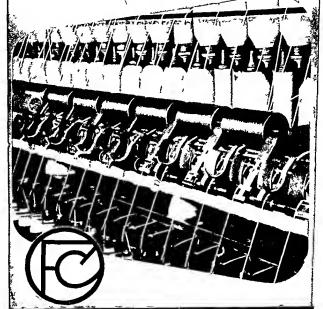
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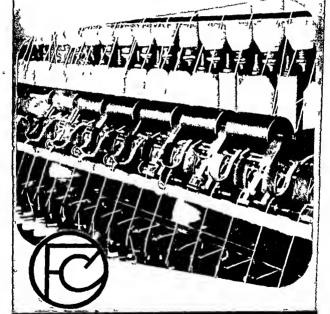
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THE COTTON TEXTILE INDUSTRY

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By Dr. M. H. PATEL, M.A., Ph.D., LL B.

Eurly Beginnings

TAT HILE Bombay was busy in the erection of its first cotton mill in 1851, Mr Ranchhodlal Chhotalal, a contemporary of Mr Dayar, was at the same time endeavour ing to establish a cotton mill in Ahmedabad According to the biographers of Mr Ranchhodial, he conceived the idea of manufacturing cloth in Ahmedabad with the aid of machinery in about 1847. Indian capital was shy at the time and the people conservative. They would, therefore, not take risks in such a venture. When therefore Mr Ranchhodial placed his project before the leading citizens of Ahmedabad, he received very lukewarm support Mr Ranchhodlal was however not a man who would allow his plans to be dropped. He was a person of indomitable courage and vision Besides, he was fortunate in obtaining help from one Mr Fullyames who, it appears, was much interested in this matter. The latter recommended the project to Messrs Bryn Duncan & Co, of London, and obtained quotations from them The estimates were received in 1849 and were again placed before the wealthy people of Gujarat It was clearly shown that cotton spin ning and weaving would pay provided it was well managed This effort also failed to have response from the financiers

But Mr. Ranchhodblin refused to be discouraged. He continued his efforts and in 1851 he got an opportunity of bringing the project to the notice of Mr. Landon an American Industrialist, who further supported the project in the meantime, the mills that were established in Bombay showed that the project had financial soundness. Encouraged by these examples, Mr. Ranchhodblal stuck to his original project and the Ahmedabad Spinning and Weaving Mills was floated in 1859 and began working in 1861.

The difficulties in getting machinery and in erecting it were enormous. The first consignment of the machinery was lost on the way because of a fire on the ship. Fresh orders had therefore to be placed. The engineer who was specially engaged to erect the plant died before its arrival. There was no railway communication between Bombay and Ahmedabad at the time. The machinery had therefore to be landed at Cambay and brought to Ahmedabad to Bullock carts. None of these difficulties however had the slightest effect on the undaunted spirit of the pioneer of the Industry in Ahmedabad. On the contrary, he superised and guided the progress personally which was his special characteristic. The growth and development of the textile industry in Ahmedabad is a rightfull fruition of this pioneer.

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ing work and a testimony of his courage, vision and fore

A start was thus given for a new industrial life in the city. The progress however in the initial stage was rather slow. Only three new mills, viz. Bechardas Madhowlal and Gujarat Spinning were started during the next 20 years.

The position by 1880 was as follows -

Position -)	
Spindles installed	58 000
Looms	700
Capital (Pud up)	Rs 20 lakhs
Lahour employed	2 000

During the period 1880-1900 the industry hil to face triany adverse factors. In the first place the closing of the funits in 1893 had disturbing effects on currincy and exchange and therefore on tride and industry. The imposition of the three and a half per cent exist dust on cloth manufactured by mills was directly detrimental to sinter est. The famine at the end of the century cause. I preciable economic loss and dislocated business.

In spite of these adverse factors some twenty file mills were added during the period. It is probable that but for them the progress would have been more rapid. The position at the end of the last century was as under—

No of mills	29
No of spin iles	4,58 000
No of Looms	8 700
No of operatives	10 000

1900 1914

The period 1900-1914 is important in the declopment of the Cotton Textile Industry in Ahmedabad. The imposition of the excise duty proved a boon in disguise. It roused national consciousness and there was a cry for support for indigenous industries. The Purtation of Bengal in 1905 gase further impetus to the Swadeshi Movement. The Textile Industry appreciably benefited by this movement. The Russo-Japanese war of 1905 06 eliminated the Japanese competition for the time being from the Industry was rapid during the period as could be seen from the following figures.—

	Spattes (1 000)			Looms (1 000)	
	 1	1900	1914	1900	1914
Ahmedabad		458	588	87	200
Bomber		2 5 3 7	3 009	230	490
Rest of Lad a		4 916	5 333	400	1010

It will be observed that the number of spindles increased by 40% and 20% in Ahmedabad and Bombay respectively, out of the aggregate mercase of 8% for the whole of India The number of looms increased by about 150% in the above cases. As a consequence of this rapid progress of Ahmeda had its spindleage increased to 135% and loomage to 20% of the all India figure. It attained a rank next only to Bom bay in size and importance and it has succeeded in maintain ing that position till todal.

The period of 1914 28 for the Textile Industry may be called one of retarded progress lt presented a splendid opportunity for development and stabilization but on the whole the industry failed to derive the best advantage for obvious reasons With the outbreak of the War in 1914 belligerents had to switch over from peace time to war economy The productive resources were diverted in the production of munitions and other war goods. There was considerable contraction in production of consumer goods in those countries, and this gave a further impetus to the indigenous Cotton Industry The dislocation offered a great opportunity to the Indian Millowners to extend their Cotton Trade They were however, handicapped because of the fact that there was no machinery manufacturing industry It was therefore not possible to instal new machinery to add to production to fill the gap created by the cessation of imports The only course was to utilize the installed capacity to the maximum possible extent to increase production The production of cloth by the Ahmedabad Mills which was 250 million yards in 1913-14 rose to 392 million yards in 1916-17 and stood at 332 million yards in 1918 19

There was also a phenomenal rise in the pince of cotton and cloth during the period 1914 19. The increase in production coupled with the rise in prices brought about buge profits to the industry. The mills in the city and island of Bombay utilized these profits in distributing liberal dividends as well as installing new machinery at high prices. Ahmedabad mills however, followed a more conservative

poley They carried larger parts of profits to the reserves which in most cases were held over for purchasing new machinery at a later and more suitable date. The progress of the Cotton Mills was apparently more rapid in Bombay and other parts of India than Ahmetabad during the period 1914 28 which can be seen from the following table—

Spindles & Looms installed at the beginning of 1928

		Sp ndles installed (in lakbs)		Looms festalled (000 om tted)	
		1914	1978	1914	1978
Ahmedabad	-	9 75	14 0-	20 31	31
Rombay		30.09	34 67	49	75
Rest of India	-	67 79	87 02	104	167

The penod 1928-38 is the turning point in the lustory of development of Cotton Textiles in Ahmedahid. It was a peniod of acute economic depression. It was marked by contraction of economic activity and a fall in the purchasing power. Under these conditions the major problem was to maintain production and profits to survive the crisis. In many cases this proved difficult and industrial units went into liquidation. Under the influence of these conditions the productive capacity of Bombay City considerably decreased. The Ahmedabad mills however had a different

Message from the Chairman, the Ahmedabad Millowners' Association

Dear Shri Gandhi,

I am glad to learn that you are bringing out a special publication, "The Indian Cotton Textile Industry Centenary Volume" to commemorate the first 100 years of the Indian Cotton Textile industry

India today possesses the second largest Textile Industry in the world, ranking next only to U S A and being one of our biggest national industries, it enjoys a Unique place in our economic life The industry has also vast potentialities for expansion.

I am confident that, like your publication, "The Indian Cotton Textile Industry Annual", the special publication will also prove interesting and instructive

I heartily welcome the new publication.

Yours sincerely, CHANDULAL P. PARIKH experience. They could substantially add to their spindles and looms which can be seen from the following figures -

			Spandles qia fektis		tooms tests so goog	
	-		19' 4	1933	1973	1939
Abmedahad			140	194	31	47
Bombay		-	217	ოეგ	25	66
Best of Ind a	-		8 0	100.2	167	200

It will be natural to inquire about the reasons which led to this rapid increase. It may be mentioned that the profits of the War period, unlike in Bombay, were allowed to be accumulated This sound business practice has rightly received approbation from the first Tariff Board Report on the Cotton Textile Industry These surplus funds were seeking an outlet for investment and only the textile industry had sufficient attraction for the local people. Other factors which encouraged investment in the industry were (1) removal of import duty on mill machinery, (2) removal of the obnovious excise duty on production of cloth, (3) appreciated exchange which enabled them to import reachinery at the advantage of 121%, and (4) the Swadeshi Movement of 1930

During the period 1938-41 four to five mills had to be taken into liquidation and scrapped as they were very old During the period 1941 48, the industry enjoyed a short spell prosperity England and Japan two of the principal

loth manufacturing countries, were involved in the World War II This eliminated competition in the home as well as other markets which were formerly being supplied by them Production increased to the maximum to meet this demand There was also a phenomenal rise in prices Profits were high but for want of availability of necessary machinery at home or from foreign markets, the industry could not increase its productive capacity. The position of the Almedabad Industry at the end of 1948 was as under -

No of Mills	74
No of Spindles	18.5 lakhs
No of looms	42,800
Paid up Capital	898 lakhs
Capital invested	Rs 2,500 lakhs

It will thus be observed that the textile industry in Ahmedabad has shown a remarkable progress during the century From a rudimentary beginning of 2,500 throstle spundles, the industry has today almost 2 million spindles and 42,000 looms having capital investment of Rs 25 crores It now represents as much as 25% of the productive capacity of the country It has an excellent standard of production and has won admiration in the home as well as the foreign markets

We may now refer to some of the other aspects of the history of the industry. It may be mentioned that the industry in Ahmedabad has passed through many vicissitudes but on the whole it has maintained satisfactory profits as can be seen from the following figures -

Аустаде рго	fits per annum
Persod	(in lakhs of Rupees)
1923-27	50 04
1928-32	51.84
1933-37	29 71
1938-42	161 45
1913-47	194.34

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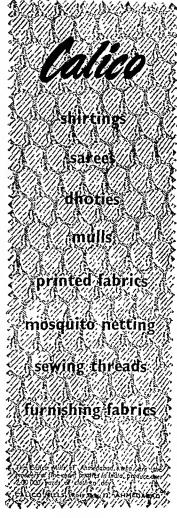
Early information on the wage position is scanty. From the available information it is found that in 1880 the average wage was Rs 8 per month per worker It was Rs 954 in 1903 and rose to Rs 13-9 by 1914 Since then wares in the Ahmedabad Cotton Mills have increased to a considera ble extent During the First World War wages of different departments were increased in different proportions. There was no uniformity of principle in the increase. As a conse quence of these increases the average wage rate rose to Rs 35 by 1921 The condition of the industry changed thereafter and there was a uniform out of 15 6% in June 1923 The average wage was thus reduced to about Rs 32-8 This posi tion continued till about 1929 The Textile Labour Association then demanded a wage increase. As a result of urbitration proceedings, the wages of spinners were increased by 8% and those of weavers 5%. The average wage came to Rs 35 and continued till 1935. In view of the conditions of the industry, the Millowners demanded a wage cut of 25% There were usual arbitration proceedings and the wages were reduced by 6 1/4% from 1st January 1935 The wages were once again increased by about 9% from 1938 as a result of the interim recommendations of the Textile Labour Inquiry Committee This position continued till 1947, when with the fixation of the minimum wage and increase in wages of different departments at varying rates. the general wage level has increased by about 30%. The present average wage rate is estimated at Rs 45 per month and is the highest in the country

During the Second World War and since then, the workers are receiving dearfood allowance according to the prince ples laid down by the Industrial Court. They have also been receiving annual bonus under awards or agreements varying from 20 to 375% of annual earnings. On an average, the rate of dearness allowance has been about Rs 65 per month. The aggregate average income, therefore, of a worker in Ahmedabad per month comes to about Rs 125. This is the highest wage paid to a worker in any Textile Centre in the country.

Ahmedabad is an internal town and suffers from some handreaps. Its sources of coal supplies are the fields of Bengal, Bihar, and the CP. They are hundreds of miles away. Freight charges therefore become very heavy and the industry his to early Injers stocks of coal than otherwise. The nearest port is Bombay, and the Industry has to obtain its machinery, spare parts and stores through this port. Freight charges again are heavy. The major competing centre of Bombay is favourably situated in both these marters. It obtains power from the hydroelecture system which is comparatively cheaper. It is estimated that the total disadvantage to Ahmedabad in companson to Bombay on account of higher cost of power and the additional freight charges will work out at about Rs. 3 to Rs. 4 per working syndle or by about Rs. 2 laking per mill per annum.

It will thus be observed that the Textule Industry in Ahmedabad has shown remarkable progress in spite of these various handicars. It has also maintained satisfactory profit and is paying the highest wages. These facts are amongst attributable to (a) the structure of the industry, (h) quality of production, (c) efficiency of management, (d) efficiency of labour, and (c) cordivil capital labour relationship

Considerable addition has been made to the machinery since 1928. Machinery therefore is on the whole more up-to-date and efficient. Besides, following the recommendations of the First Indian Tariff Board, the nulls obtained plant and equipment to manufacture fine and superfine cloth which till then was monopolised by foreign importers



experience. They could substantially add to their spindles and looms which can be seen from the following figures.—

				Sp pdles	(10 lakbe	(000 on Hed)	
	_			19.8	1939	1975	1933
Abmedabad				160	19.1	31	47
Bombay				31	921	75	68
Re t of Ind a		•	***	8.0	1002	187	200

It will be natural to inquire about the reasons which led to this rapid increase. It may be mentioned that the profits of the War period unlike in Bombay were allowed to be accumulated. This sound business practice has rightly received approbation from the first Tariff Board Report on the Cotton Textile Industry. These surplus funds were seeking an outlet for investment and only the textile industry had sufficient attraction for the local people. Other factors which encouraged investment in the industry were (1) removal of import duty on mill machinery (2) removal of the obnovious exist duty on production of cloth (3) typecastic exchange which enabled them to import arisely.

During the period 1938-41 four to five mills had to be taken into liquidation and scrapped as they were very old During the period 1941-43 the industry empoyed a short spell of prosperity. England and Jayan, two of the principal colori manufacturing countries were involved in the World War II. This climinated competition in the home as well as other markets which were formerly being supplied by

them Production increased to the maximum to meet this demand. There was also a phenomenal rise in prices Profits were high but for want of availability of necessar machinery at home or from foreign markets, the industry could not increase its productive capacity. The position of the Ahmedabad Industria at the end of 1948 was as under—

megapag magazi at the	end of 12 to was as ander
No of Mills	74
No of Spindles	18.5 lakhs
No of looms	42 800
Paid up Capital	898 lakhs
Capital invested	Rs 2,500 lakhs

It will thus be observed that the textile industry in Ahmedabad has shown a remarkable progress during the century. From a rudimentary beginning of 2 500 throstle spindles the industry has roday almost 2 million spindles and 42,000 foroms having capital investment of Rs. 25 cores. In now represents as much as 25% of the productive capacity of the country. It has an excellent standard of production and has won admiration in the home as well as the foreign markets.

We may now refer to some of the other aspects of the history of the industry It may be mentioned that the industry in Ahmedabad has passed through many vieusitudes but on the whole it has maintained astisfactory profits as can be seen from the following figures—

Average profits per annum					
Period	(in lakhs of Rupees)				
1923-27	50 04				
1928-37	51 84				
1933-37	29 71				
1938-42	161 45				

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They installed machiners for fine spinning High speed machines for spinning, winding and warping were further introduced. Processing and finishing were mechanized and improved with the aid of improved machinery. Many of the mills installed machinery for four-colour printing as well as mercerization. In 1928, the production of Ahmedabad mills of yarn of counts 408 and above was 4 million lbs out of the total of 14 million lbs in India. During the year 1948 the production has increased to about 60 million pounds out of the total of 130 million by the Indian mills. The Ahmedabad mills produced about 300 million yards of coloured goods and 40 million vards of cambries and lawns during the year 1948 and this represented about 40% of the Indian mills and the Indian production.

Management

The characteristic of the Ahmedabad mill management is personal supervision and economy. Unlike many other centres, the offices are situated on mill premises. This ensures economy in administration as well as better check. The Agents regularly attend the offices and go round the departments of the mills. The success of the industry to a great extent is attributable to this feature of the mill manage ment.

Labour

Labour in Ahmedabad is also more efficient than else where. Unlike many other centres about 50 per cent of the labour is locally drawn from the city and the district

It is more stable and less migratory. It is also more homogeneous. The percentige of absentecism is appreciably less while the percentage is as high as 12 to 15 in Bombay, it is only 2 to 3 in Ahmedabad. As a result of these factors the production per worker is the highest in Ahmedabad. While average Indian production is about 500 yards per worker it is about 700 yards in Ahmedabad.

Capital labour relationship of the Ahmedabad Texrile Industry is unsque in India Under the inspiring guidance of Mahatma Gandhi, the Father of the Nation, a system of voluntary arbitration was adopted as early as 1918 when the principles of labour organisation or of collective bargain ing were unknown in this country. This achievement ena bled the leaders of industry and of labour to resolve many major and minor disputes during the course of 20 years of its working. The bonus disputes from 1920 to 1923, the wage disputes of 1930 and 1935 and such others were armea bly settled It prevented loss of millions of man days, loss of wages to workers and loss of profits to the industry With this spirit of co-operation it was also possible to accept the principle of rationalisation in 1935 as well as the introduction of standardization of wages in 1938 which in some cases meant a decrease in the wage rates. These measures have proved to be of mutual benefit to labour and capital This method of co-operation is an example for adoption by others At the present time the industry is passing through a crisis But so long as this happy relationship is maintained there is reason to be sanguine that the industry will be able to continue its march of progress

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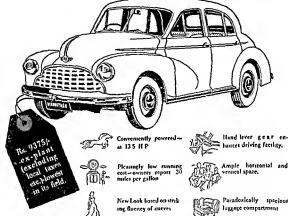
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THE COTTON TEXTILE INDUSTRY OF BENGAL

By SUBINOY BHATTACHARJEE, M.A. Secretary, Bengal Millowners' Association

Ancient Ilistory

BENGAL'S claim to the manufacture of linen and a sort of fine white silk dates back to some three centuries before the Christian era. But we come across frequent references to the manufacture of the finest types of cotton cloth in Bengal in Kautilya's Arthusastra of about 400 BC It is widely believed that Egyptian mummies have been found wrapped in Bengal muslins. There is, however, no doubt that by the beginning of the Christian era the cotton manufactures of the country became widely known to the Greeks Next, many references to cotton cloth are met with in the Varaha Samhita, ie about A D 600. It may incidentally be mentioned that even till about three centuries ago, cotton was comparatively unknown to the civilized nations of the West. In the ninth century, the Arabian traveller Sulaiman wrote. "In the Bahamani Kingdom (ie Eastern Bengal) such fine cotton fabrici are produced that a full sized cloth passes right through the hollow of a ring . Marco Polo in 1290, the English traveller Ralph Fitch in 1583, and Abul Fazl, the author of Ain i Akbari, referred to the famous cotton industry of Bengal in their works It is known from their writings that at Sonargaon, Dicca, the best and finest cloth in India used to be produced in 1675-80, muslin used to be manufactured at Santipur, Maldah and Hooghly

The famous muslins of Dacea at one time became the craze of the elite of society. The poetic names given to the different varieties give one an idea of their fineness "Ab rawan" (running water), Bakt Hawa (made of air), "Shab Nam" (the evening dew) and so on It is said of Aurangzeb's daughter that she was chastised by her father for being insufficiently clad although she had worn seven muslin garments one over another Another anecdote says that a cow, while grazing, swallowed a full ten-cubit long Abruyan cloth which had been spread on grass to dry The skill, patience and perseverance of the weavers who manufactured such extraordinantly fine cloth are indeed amizing It is said that it took a weaver at least five months to produce such a fine piece of cloth and the spinner about two years to spin the necessary jarn. It is also believed that both the spinning and weaving had to be done during the hours of dawn before sunrise, by the side of a pond, in order to ensure a humid and cool atmosphere. Otherwise the jarn would break, so remarkably delicate was the jarn? It can, therefore, easily be imagined that the cost of such eloth was not inconsiderable. Even during the middle of the last century the price of mulmul khus was Rs 10 per vard—that is to say, about Rs 30 in the denomination of the present days. A piece of Dacca jamdani cost Rs 450 and a piece of Ab 1 jara 5 yels x 36 ins cost Rs 400 It was

possible for the industry to flourish under Mithommedan rule because of the patronage extended to it by the padshahs, nabobs and their courtiers. The lay public esidently could not afford to buy such expensive stuff.

It is on record that Bengal used to export cotton goods in bulk quantities to France Holland and England in 1657 But the Dacca muslin was first exported to England in 1666 By 1675 the fashion of wearing muslins, the costlier fabrics of Dacca, as well as the cheaper stuff from other parts of the country became prevalent in England. This habit of the people expanded rapidly all through the last quarter of the seventeenth century till it began to excite the jealous; of the British manufacturers so much so indeed that Acts of Parliament had to be passed in 1700 and 1720 probibiting the importation of certain classes of Bengal made piece goods into the United Kingdom. It may incidentally be men tioned that Bombay and Surat then used to send raw cot ton to feed the Bengal looms, but it is on record that Dacca mushins were manufactured entirely out of the produce of the Dacca district

The Declare

Although cotton textle manufacture was by far the most foun-thing malustry of the Province at the time, there is no reason to suppose that the people of the soil profited from it to any appreciable extent. Like Indigo, at was practically the monopoly of the East India Company, whose gomostahs (native agents) meted out abominable treatment to the local weares whom they compelled to accept "dadans or advances. The price paul was so wretched and the terms of contract were so inquitous to the wearer that they gazerise to the weavers thumb story, which stated that the East India Company chopped off the thumbs of the weavers so that they might not ply an independent trade of their own. Or alternatively the weavers themselves out off their thumbs to avoid being coerced into working for the Company.

A decline in French and Dutch commerce set in in 1759, and it finally collapsed during the troublous days of the French Revolution (1789 95) During the period 1771 to 1793 the East India Company exercised a quasi monopoly over the export trade in cotton goods of Bengal In the year 1772 alone, the Company exported cotton goods valued at Rs 70 lakhs (about Rs 125 crores at present-day denominations) But by that time the decline of the industry had thready set in A series of inventions in England during the latter half of the eighteenth century, e.g. Hargreave's Spinning Jenny (1767), Arkwright's Water Frame (1768), Crompton's Mule Spinning (1775), Cartwight's Power Loom (1784) that is, the Industrial Revolution in England, gave the final death blow to the handloom industry of Bengal There was a rapid improvement in the manufac ture of British piecegoods which began to find a ready market in India through the East India Company, who had willingly reversed their process of trade Of course, British imports of piecegoods into India were not really effective till 1813 It should be noted that at the rime there was no sympathetic popular Government in the country to safe guard the indigenous industry of Bengal against the on slaught of machine made imports

Bertish Policy and the Industry

Impostion of arbitrary, heavy and discriminatory taxes and duties on our Industry characterised the British policy ever since this country came under British domination. An when of how such taxes and duties imposed on the Industry affected it, is gathered from the fact that the total excise duty leved on Indian mill made goods from 1896 to 1925 26 a period of thirty years-amounted to the gigantic figure of Rs 22.28.39 150 This policy of repression and suppression of the Industry followed by the Pritish Government at the dicretion and in the interest of Lancashire and Manchester, was taken serious notice of by even many British officials and non-officials The great historian H H Wilson remarked — Had not such protective dimes and decrees existed the mills of Paisely and Manchester would have been stopped at their outset and could scircely have been set in motion by the power of the steam. They were created by the sacrifice of Indian manufacturers Had India been independent, she would have retaliated would have imposed prohibitive duties on British goods and would thus have preserved her own productive industry from annihila tion. This act of self-defence was not permitted her she was at the mercy of the stranger, British goods were forced on her without prying any duty and the foreign manufac tuter employed the arm of political injustice to keep her down and ultimately strangle a competitor with whom he could not have contended on equal terms

The Revival

During the transition from the mederal to the modern age in the wake of the Industrial Revolution of the eight eenth century in Europe, many indigenous small seale and cottage industries in India succumbed to the onslaught of foreign competition, but the cotton textile industry which until then consisted exclusively of hand spinning and hand wearing not only survived by adapting uself to the changed conditions but actually entrenched uself firmly in the Indian soil.

The great revival came in the machine era Few people know that the first cotton mill in India was started in Bengal in or about 1830 under European management and was called the Fort Gloster Mills That mill is still in existence under the name of Bowreah Cotton Wills Co Ltd., managed by Messes Lettlewell Bullen & Co Ltd Even in later years, Bengal put up a fairly satisfactory perfor mance in the race for establishing mills as compared with other centres of the mill industry in India. In 1873 there were 28 mills in Bornbay as against 15 in Bengal Later on however, Bengal slipped back and in 1931 there were 73 mills working in Bombay Island as against only 13 in Bengal Since 1932, however, a new awakening has been discernible and in 1940, at the commencement of the last war, there were no less than 30 mills at work in Bengal with a complement of 9,940 looms and 4,44 196 spindles

Present Position

The position of the industry in Bengal since 1940 to the eve of partition in 1947 can be gauged at a glance from the following table —

Year		o, o milis,		No. of Sprodles	\o. of looms.	Production (n yards)
1940-41 1911-42 1942-43	1	33 33	9 69 31 804 2,91 89 501	4,58 \$16 4 74,284	10 615	200 179 687 194 49: 396 174 977 188
1943-44 1914-45 1945-46 1945-47	-	34 37 27 38	3 61 49 917 3 5) 66 418 2 99 49 47 1 4 97 01,35-	4 81,206 4 79 691 4 76 432 4 75 766	10,56) 11 975 11 967 11 391	231 151 460 210 085 748 "09 484 175 176 487,776

It will be noticed from the foregoing paragraphs that reference has all along been made to Bengal, that is, undivided Bengal of pre partition days. It is still difficult, if not impossible, for an average Bengali to speak or wri c of Bengal in terms of the present truncated State of West Bengal In so far as past history is concerned it is only natural to refer to undivided Bengal of pre-partition days but speaking of present position and future prospects, it is necessary to refer to the State of West Bengal The post tion of the industry in West Bengal today is as follows -

Year	No. of mills,	Paid up capital,	No. of spindles.	Ne el	Production (in yard-)
	1			! —	
1945-49	29	4 11 54 157	3 93 909	8 924	1:0 m lion yds, (approx).

Prospects of the Industry in West Bengal

Turning to the prospects of the textile industry in this province, the first and foremost favourable factor that easily

occurs to one is the extent of the home market. A popula tion of about 225 million people in West Bengal should normally require at least 450 million yards of cloth at the rate of 20 yards per capita, although West Bengal mills can at present produce only about 170 million yards of cloth It will be seen, therefore, that at present the cotton mills in West Bengal cannot even meet a fraction of the total require ments of the State, not to speak of the wide market in the adjoining States of Bihar, Assam and Orissa, which largely depend on West Bengal for their supplies

Bengal's proximity to the coal fields has also placed her in a most favourable position in so far as availability of cheap mouve power is concerned. The humid atmosphere and moderate climate of the province are conducive to the deve lopment of the mill industry Abundant supply of com paratively cheap labour within the province is a great advan tage to the industry. A liuge, more or less trained labour force, consisting of indigenous workers as well as workers recruited from Madras Bihar, Orissa and Madhya Bharat has grown up in the vicinity of Calcutta, with the result that the mills round about the city do not have to suffer any dearth of labour supply Moreover, the Bengalee worker, although physically a bit poorer and sometimes averse to factory work, is intelligent and possesses the requi site delicacy of touch and flexibility of fingers The manual dextenty of handloom weavers bears ample testimony to this fact. Mere adaptability to factory surroundings and a sound training and experience should enable the Bengalee workers to become excellent operatives in cotton mills lt

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Page Hundred and 15 rty n ne

is a matter for considerable gratification that even some youths belonging to the Bhadralog class are shaking off their ingrained prejudice against manual work and are showing proficiency as mill operatives

In this connection, the following remark made by the late A B Guha, a leading cotton millowner of Bengal, is highly significant and instructive -

"At one time Bombay was believed to be the natural seat of the cotton mill industry on account of its chimate, proximity to market and the most important cotton producing areas and other reasons Though cotton is grown. more or less, in many Provinces, nearly 75 per cent of the total crop is raised in Bombay, Central Provinces and Berar and Hyderabad State But, in spite of these advan tages, the share of the Bombay industry has receded, since 1908 from about 50 per cent of the total Indian produc tion to 40 per cent due to the development of other centres like Ahmedabad, Sholapur, Madras Dellu and Cawr pore It is not our nurpose here to discuss the relative advantages of these different centres, but we want to emphasize that the recent tendency has been for a wider distribution of cotton mills in spite of the geographical and other advantages of Bombay and Alimedabad. A similar trend has been observed in Europe and the USA In the life history of an industry, centralisation has undoubted advantages, but, as time goes on it becomes a handscap Wherever an industry is massed together, rents, taxes and cost of living go up, trade umons form, the machinery becomes old and obsolete, and mevitably new centres of productions spring up, excessive concen tration of population in limited areas also gives rise to difficult problems of samuation and housing, and produ ces a lack of equilibrium between agriculture and indus try in the country as a whole

Bengal, with its unforgettable tradition of the cotton textile industry of the days of yore and with spare capital, labour and enterprise seeking profitable employment, has launched on a cotton mili programme conceived on modern. up to-date lines, and has so far achieved remarkable success in the field

Difficulties of West Bengal Mills

Whilst admitting that there are no inherent handicaps in the way of an all round development of the cotton textile industry in West Bengal, it is well to remember that there are certain problems of a very serious nature which must be tackled adequately before the cotton mills in West Bengal, existing or prospective can hope to succeed in the long run Speaking of difficulties, the first and the most vital one appears to be the problem of capital. It is not suggested for a moment that Bengal lacks the necessary capital, nor is it strictly correct to say that the average Bengalce fights shy of investing in industrial ventures lt is common experience that renowned industrialists find little or no difficulty in tapping the liquid capital of Bengal by issuing shares of industrial concerns to the people of this State, and even middle-class Bengalees have been found to subscribe shares in industrial undertakings guided and controlled by well known business magnates. It is only due to the undesirable growth of mushroom companies, and frequent company failures in recent years, that the prospec tive investors in Bengal have become somewhat cautious Unless the management consists of persons with proved



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WORLD COOK'S SERVICE ability and experience in the matter of running a cotton null and the staff includes technical experts of high ealibits, the concern naturally fails to inspire the confidence of the general public and its future automatically becomes scaled. A large number of cotton mills have been registered in Bengal during the last few years, of which there are numer ous concerns which have preficielly made no progress with their construction work for want of funds. It is worthy of serious consideration whether the time has not come to try to combine the numerous small ventures into a few powerful concerns with adequate capital and brain power

Closely connected with the question of capital is the economic size of a mill which can reasonably expect to become a profitable concern in the long run. In order to be success ful in the face of intense competition from within, as well as from without, a cotton mill must have adequate resources at its disposal, not only for producing the goods economical ly, but for a satisfactory organisation of its market and for an extensive advertisement and publicity campaign for popularising its products. It has been estimated that an ceonomie sized mill should have at least 500 looms and 25 000 spindles. Viewed from this standard, the number of economic units in West Bengal come to only four, and even amongst these four mills there are some which are equipped with old and worn-out machinery, and cannot hope to attain the requisite efficiency It is needless to men tion that smaller units are at a distinct disadvantage in the purchase of raw materials and stores and the sale of their finished goods. The overhead costs of a small mill are bound to he high, and it cannot afford to secure the services of a properly trained and highly paid technical staff Morcover. the establishment cost and other expenses are proportionately much higher in the ease of smaller units. A peculiarity of West Bengal is that there are no less than 14 non spin ning weaving factories in this province which cannot be regarded as economic units, and being dependent on the market for their yarn requirements, they find it difficult to compete with composite mills having both spinning and weaving arrangements

The financial weakness of the majority of the West Bengal mills prevent them from carrying on a systematic research work both in regard to efficiency schemes and vocational selection and industrial psychology with a victor increasing the output and diminishing the production costs. Rationalisation, in the widest sense of the term, is urgently called for if the cotton mill industry in West Bengal is to be placed on a sound foundation.

Diversification of production with a view to meeting the barned requirements of consumers is also a erying need in this State. It is advisable for the new mills, as well as the bigger mills to go in for new cyles, such as shritings, since ings, sheets, towels tapestires, furnishing fabrics and such other lines as have not yet been fully explored by the exist ing mills in West Bengal Mere concentration on the manufacture of ordinary dhouses and sarces is likely to become unremunerative in the long run.

Expansion Schemes

Under the post war expansion scheme, the total allocation of looms and spindles to the province of West Bengal was as follows —

Looms . 5,763 Spindles 2,30 524

Out of the above allocation, the existing mills received an allotment of 796 looms and 75,509 spindles, whilst the new mills received allocations for 2,225 looms and 1,85,616 spindles

There have been some eases of cancellation and abardonment of expansion schemes which have necessitated the reallocation of the looms and spindles

Supply of Raw Cotton

One of the chief handicaps of the cotton mills in West Bengal is their situation at a very great distance from the chief cotton growing districts in India. While this in itself is not a guiding factor in the establishment of cotton mills. as exemplified by leading textile centres like Japan and the United Kingdom, at least at the initial stages this has its own significance Bengal mills have to depend for their supply of raw cotton on Madras Madhya Bharat and the Bombay State in Incha, or on Western Pakistan, Egypt. East Africa and America for better types of cotton The best Indian cotton does not spin more than 30s counts or at the most 40s. For the production of finer goods, the West Bengal mills have to depend entirely on foreign cot ton Owing to the absence of fumigration facilities at the Calcutta Port, American cotton which is not allowed entry into the country without furnigation, has to be brought to Calcutta through Bombas The West Bengal mills thus have to incur an additional cost by way of railway or stea ver freight

The import duty on foreign cotton, high freight charges and the uncertainties of supply during the international political disturbances, all point to the one conclusion that attempts should be made to grow the required types of cotton within the State so is to meet the requirements of the local mills. The cotton at present cultivated in West Bengal is not fit for use in cotton mills owing to the shortness of staple and lack of praper strength of the fibre. The last great war and subsequently the partition of the province and the problem of food shortage have dealt a severe blox to the endeasours made in the direction of cultivating better types of cotton in this State. In fact, the problem of cotton stortage and non availability of cotton at reasonable prices have been causing grave anxiety to the cotton nulls in West Bengal.

Conclusion

If for no other reason, the cotton mill industry should be developed to its full stature in the State of West Bengal to combat the growing menace of unemployment in the state. An investigation into the conditions of employment in cotton mills revealed that the total number of employees including clerical staff in the Industry is about 30,000, which means that nearly 1,3000 people are directly dependent on the industry for their subsistence. It is should be renembered that a great many people are also connected with the cotton mills in various other ways, such as brokers, cotton and mill stores dealers shop-keepers in the mill areas, wholesale and treat dealers in goods produced by the mills and numerous other persons, who can find employment by an adequate development of the cotton mill industry in this State is a matter for considerable gratification that even some youths belonging to the Bhadralog class are shaking off their ingrained prejudice against manual work and are showing proficiency as mill operatives

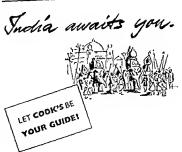
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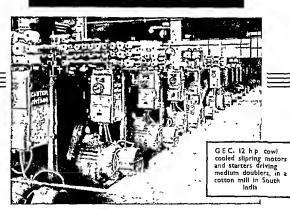
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Organization of Labour in the Indian Cotton Textile Industry

By

Shri SHAMALDHAREE LALL, C.I.E., I.C.S. Assistant Secretary-General United Nations Organisation, Lake Success

*This article was contributed recently when Shri S Lall was Secretary Ministry of Labour, Government of India

ONE would be justified on the basis of the available facts, in making the claim that labour in the Indian Cotton Textile Indiastry has led the labour movement in India and has achieved results which have served as beacon light to employees in other industries and those in distant regions as well

Employment

Of the 176 lakins of persons employed in 1947 in all factories in the Indian Union (excluding East Punjab) 6.3 lakins or 36 1 per cent were employed in this industry alone it is also of interest to note that in spate of the fact that several new industries have been established during the last quarter of a century, labour in this industry has not only continued to form the single largest group of factory workers but their proportion to the total has gone on increasing. Thus, while in 1923, of the total number of persons employed in all factories in undwided India, those employed in this industry formed 246 per cent., in 1947, the corresponding percentage was 361.

Bombij State, and particularly Bombij Gri and Abmedabad, have always been, and continue to be, the most important centres of the cotton mill industry. Of the 63 laks or 635 per cent were employed in the Bombij State Next in order of importance come the States of Madras, UP, West Bengal and Madliya Pradesh which employed 91,440, 59,621, 30,286 and 29,118 cotton mill workers respectively during 1947.

Unlike other industries the Cotton Mill Industry contains a considerable proportion of women workers. If we go from North to South, this perportion seems to go on increasing. In 1947, out of the 6.3 likhs norkers employed in the industry, about 64 000 or 101 per cent of the total were women. It is noteworthy, however, that worsens employment in the industry has not increased in the same proportion as that of men.

Despite many changes that have occurred in recent years, women's employment in cotton mills is still confined to certain departments and occupations like winding, recling, sweeping, etc. Except in the Cochin State, women are generally not employed in the wearing department. It does not necessarily follow from this that Indian women do not make good weavers. Their continuing to work in certain departments only is merely traditional. In the weaving industries in the U.K., for instance, as against 27,510 male workers employed in 1945 the number of women workers was 69,390. According to an estimate, in Japan the proportion of women to men in the textile industry twis 38.10.5 Similarly, in China, in the textile industry there is a preponderance of the women workers especially in silk and enterin factories.

'It will thus be seen that the field of women's work, is the subject of many differences of opinion and even of curious contradictions which give the student of social affairs cause for reflection. An half hour's trip by plane, and the crossing of an almost invisible frontier—and the notion of womens work appears in a completely new hight, hardly a woman in the cotton spinning mills of Madras, but 52 per cent in the neighbouring. Stare of Cochin and nearly as many in Pondicheria.

Recruitment

The composition of the labour force in the industry has retrained more or less the same. But the outlook of the worker has definitely changed during the last quarter of a century. The cotton mill worker is no longer a bind of passage washing to earn a few rupees in the City and going back to the village for the cultivation of his land. Many factors have brought about this change, not the least important amongst which is the increasing pressure on land and the gradual break up of the joint family swem even in the villages. Moreover, the new generation of cotton mill workers has become so used to the amentures of city life.

that they prefer to work in the cities rather than work on the land or be idle in the village

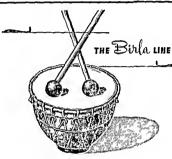
Although the composition of the labour force has remained the same, vast changes have taken place in regard to the methods of recruitment. If one looks back 25 or even 15 years and compares the position regarding recruit ment then prevailing with what it is today, one would see a most striking change Previously, when a mill wanted fresh recruits, they were either recruited by the jobber at the mill gates or he brought in his friends and relatives from his own village. As is well known, this method n it only increased the power and influence of the jobber but led to any amount of corruption All this has gone The tobber mukaddam and the sirder have been put in their right place and although in a few centres there may be a certain amount of perotism, on the whole, it can be said that in most important centres of the industry there is little or no corruption in the matter of recruitment

Largely, as a result of the recommendations of the Royal Commission on Labour in India, most mills have now appointed Labour Officers one of whose functions is to recruit labour to maintain proper lists of substitute work ers and to investigate into all cases of corruption. In Bombas City the Millowners Association have themselves appointed a full time Labour Officer and the Government of Bombay, too have a serior Labour Officer to enquire into the day to-day grievances of the workers and to ensure henerally that no worker whether he is a fresh recruit or an old employee is allowed to suffer I might mention here that the Government of Bombay have recently introduced a scheme for the decasualisation of labour in the cotton mills at Ahmedabad in co-operation with the Gov ernment of India who have made available the services of their Employment Exchange at Ahmedabad for the purpose

Wages and Earnings

In spite of the fact that the workers in this industry were not too well organised they were the pioneers during the aftermath of the First World War in demanding and secur ing a dearness allowance which although it fell short of the rise in the cost of living, was much higher than could be obtained by workers in other industries in the country Similarly also, during the boom succeeding the First World War cotton textile workers notably those in Bombay, were the first to demand and secure profit bonuses. During the last few years the average total earnings of workers in this industry is the highest in the country In 1947, for instance, the average annual earnings of cotton mill workers in the Indian Dominion were Rs 911 as compared to Rs 498 in the jute mill industry and Rs 700 in the Engineer ing Industry A State wise break up of the figure of average annual earnings of cotton mill workers in India during 1947 shows that on an average in West Bengal the workers were paid Rs 644 in Bombay Rs 1,041, in CP & Berar Rs 652 in Delhi Rs 894, in Madras Rs 670 and in UP Rs 708 Cotton mill workers have also been able to secure for themselves the highest basic minimum wage and the largest quantum of dearness allowance. In Bombay City the minimum wage both for men and women is Rs 30 in Ahmedabad Rs 28, in Sholapur Rs 26, in Kanpur Rs 30 and in Indore Rs 26 But more than the basic wage, the highest quantum of dearness allowance which is generally hinked with the cost of living index number is to be found in this industry. At one time, the cotton mill worker in Ahmedabad was getting as much as Rs. 74 per month by was of dearness allowance.

The workers in this industry hate also been in recent of the largest profit bonus. The highest inmount of bonus in recent years was awarded by the Industrial Courts Tribunals, etc. in 1948. Thus in Bombay and Ahmedabad which account for nearly 3½ lakhs of towkers the bonus awarded during 1948 was equivalent to 4½ months wages Other important industries, notably the jute in 1 stry, pay no profit bonus.



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A striking feeture of most factory industries in the country for a number of years was that in the same centre and in the same industry, the wage rates prevailing for the same occupation in different units were different. The same occupation in different units were different. The Ahmedabad industry was the first to introduce standardisation of rates in certain departments. Recently very great progress in this matter has been made, due largely to the recommendations made by Industrial Tribunals or by ad hoe standardisation committees appointed by them. The position, therefore, is that in most of the important centres of the cotton textile industry wage rates have been standardised to a very considerable extent.

Trade Unionism

Among industrial workers in India cotton titill workers have been pioneers in the formation of trade unions. It is unincessary to write at length about the great work that has been achieved by the Ahmedabad Textile Labour Asso catton which was started by Mahrum Gandh The Ahmedabad Umon was the first to accept the ideology of peaceful settlement of industrial disputes without resorting to strikes and of settling differences by conclusion and arbitration. There are at present about 158 registered trade unions of cotton mill workers with a membership of about 3.2 Jakhs. This means that every second worker in a cotton mill is a trade unionst—provided, of course that the membership figures are correct. The statement below shows the number of registered trade unions of cotton mill workers and their membership in the various States.—

State	No of Trade Unions	Membersi p
1 Almer and Merwara	2	3 9 1 1
* 2 Bihar	2	200
3 Bombay	50	1 74,207
4 CP & Berar	22	32 072
5 Delhi	3	7 628
† 6. Madras	39	5° 465
7 Orissa	1	140
R U.P	10	29 663
‡ 9 West Bengal	29	20.822
	Total 158	3,21 003

- * Membership is not known in 1 case
- † Membership is not known in 8 cases
- 1 Membership is not known in 3 cases

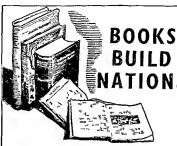
Welfare Activities

Governments, both Central and Provincial, have been assuming greater responsibility for the welfare of labour which was being looked after formerly by the employers Unfortunately, since the outbreak of the last war, owing to difficul ies of getting building material, equipment, etc., it has not been possible to register much progress in providing amenities to labour All the same, in most important centres of the industry, provision exists for free medical relief creches etc. One of the war time developments has been the starting of canteens where light refreshments and snacks are provided and in some cases cooked meals as well Some of the most notable examples of welfare work are to be found in the cotton mill industry For instance, the mills in Delhi Madras and Madura provide an abject lesson of what an enlightened employer can do for the welfare of his operatives. The Delhi Cloth Mills have a Welfare Trust Fund to which every year the Company

credus 15 per cent of the profits The housing colony provided by the Madura Mills at Hars eyatti is a model for any enlightened employer to follow and should serve its an eye-opener to those who still think of industrial housing in terms of back to-back one room tenements

A striking development which has occurred in recent years as a result of the awards of Industrial Tribunals is the institution of contributory provident funds in the industria in certain Proxinces, notably in West Bengal Madras and CP and Berar In Bombay City about 40 mills pay retirement gratitutes to their workers. It is how ever, unfortunate that the institution of Provident funds has not made much proxines lately.

(Continued overleaf)



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The housing of industrial workers in India has always been a by word and a reproach. This is true also of cotton mill workers. The chawls of Bombay the ahatas of Langue the cheris of Madras and the bustees of Calcutta are too well known to require comment. Governments both Central and Provincial have been trying to do their best to improve the situation but the problem is so colossal that it will take years of patient work and considerable finance to solve it in a satisfactory manner

Labour Management Relations

Since the adoption of the Industrial Truce Resolution there has been much improvement in the relations between the employers and the employed in this industry. Even so however there were during 1948 393 disputes in cotton woollen and silk mills resulting in a time loss of 37.5 likhs man-days. There is no doubt that in recent years the relations between the employers and employees in this industry have improved greatly but we are yet far away from the ideal relations of mutual goodwill and co-operation which should exist between masters and men. Such a transforma tion cannot be brought about overnight but this is an ideal well worth striving for A striking example of what good results can be achieved given co-operation and goodwill on both sides is the successful experiment carried out at the Darwins group of factories in Sheffield where one could see democratic control active participation in management

by the worker the trial ground for a great experiment in socialisation and the burial ground of sectional interest

Trade Unionism in this industry has no doubt made rapid progress and the textile workers have been in the vanguard in the workers movement in this country Leadership from among the workers theinselves is how ever still lacking although the last quarter of a century has recorded considerable progress. One of the difficulties in the workers choosing leaders from among themselves has been the fear of victimisation

The trade union movement has however to be supple mented by the extension of the co-operative movement Although co-operative societies are now to be found in several mills it is unfortunate that the co-operative spirit has not reached our masses I can recall with pleasure the marvellous results of co-operation achieved by the employ ers and workers in the Harvey Mills at Madura both in regard to the housing of the workers and in regard to their other needs. In emphasizing what I have said about en operation I could not do better than quote the following extract from an article by the Hon'ble Mr V L Mehta the Finance Minister of the Government of Bombay

Co-operation is often treated as a branch of Jabour Welfare work Actually, if viewed in its proper perspec tive and developed on correct lines it is much more than mere welfare activity It constitutes a new way THE of life, it attempts to bring the interests of the individual into harmon) with those of the community Against the forces that make perpetually for disorder and conflict there is ranged a force which represents C. C. CHOUDHURY, Managing Agent Secretaries & Agents

combine to serve a common end by the organisation of consumers and producers On the basis of cooperation it is averred those elements which make for the emergence of a new civilization, governance by consent tolerance and goodwill come effectively into play driving into the background the forces of violence. ill will and aggrandisement

Tison 6

The successive extensions of the Bangasri Mills have added greatly to its production capacity before this there had been two extentions at present the third one is nearing completion while the fourth is under contemplation. A new horizon of greater prosperity is thus being opened to all concerned the consumers will have more clothes the sons of the soil have more employments investors will have more returns and State will have more revenues

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M. J. VAID\A, B Com., F.R.Leon S., J.P.

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I will therefore first deal with the Rayon Weaving Industry which was started earlier. The three old established mills of which two were in Bombay and one in Calcutta and which were originally weaving real silk fabrics hegan to change over to rayon fahries since the year 1930-31. A beginning was thus made nearly 20 years ago

The very large import of rayon fabrics at very chean prices from Japan in the subsequent years prompted the Government of India to levy a heavy specific import duty on these fabrics purely as a measure of increasing the revenue The cif price of cheap quality Japanese Rayon Fahrtes was as low in those days as 2! annas per yard. The levy of specific duty increased the landed cost to over 5 annas per yard. By this time a small beginning was made in Bombay by some enterprising Indian firms who had been trading with Japan in rayon fabries upto that time by importing and installing cheap Japanese weaving and preparatory machinery and by weaving fabries here out of imported yarn. The imposition of heavy specific duty acted as a protective measure for this infant industry and by the end of 1941 when Japan entered the war quite a few thousand looms had been installed in the country for the weaving of rayon fabrics

The shortage of cotton textles for evilian consumption during the war acted as a further incentive for the establishment of more rayon weaving units, and had it now been for the very restricted imports of rayon yarn during the war, this industry might have grown very much faster during the war period. However, it soon as the war was over and as yoon as machinery and yarn became assubble from Japan and from Europe, there was a large increase in the number of rayon looms installed in India. The following figures give an approximate idea of the growth of the weaving industry.

Year	Number of looms installed
1931	1,000
1935	2,000
1940	5,000
1945	10 000
1949	15,000
1949	20,000
1950	25,000

It is estimated that over and above these looms which are installed in well-organised and mechanised factories, a large number of handlooms all over the country is also engaged at present on the weaving of artificial silk fabrics. Over and above these powerlooms and handlooms exclusively engaged in rayon weaving, quite a large number of looms (both handlooms and powerlooms) is engaged in the weaving of mixture fabrics or in the weaving of cotton fabries containing some percentage of art-silk yarn for bor ders or for designs. Although no recent official enquiry has been held to ascertain the total number of looms working on art silk yarn in the country I feel, it would be safe to state that in all more than 100 000 looms (including hand looms) are engaged in the weaving of rayon fabrics or of rayon mixtures in the country The total weaving capacity of all these looms would, in my view, be more than 45 crore yards. It will be appreciated that this figure represents a very large percentage of the total cloth requirements of the country especially in view of the prevailing shortage within the country and the need for larger exports

The total requirements in terms of rayon yarn for all these looms would be about 75 frore by per annum and their value at the prevailing prices would be Ri. 225 forces, exclusive of import duty. The average price of rayon of the eloth woven in the country would be Ri. 20 crores, Thus, by spending foreign exchange worth Ri. 225 crores, we would be producing fabries worth four times that amount. It is possible to export fabries valued at more than Ri. 225 erores per annum to foreign countries and this more than carn back the amount of foreign exchange which we may spend on the import of rayon yarn if the Industry is enabled to work to its full capacity.

Location of the Industry

The largest number of Powerlooms engaged on wearing of rayon fabries is located in Bombay. Over 100 Mills or Factories containing more than 10,000 looms are to be found in the city and suburbs of Bombay. The remaining power-looms are located at Amnirar, Ludhinan, Calculta and the States of Uttar Pradesh, Buhra, Hyderabad, Madhya Pradesh, Madria and Mysore. Next to Bombay, Bangalore is perhaps the most unportant centre of rayon weaving. As already stated, nearly 25,000 powerlooms are engaged in the weaving of rayon fabries.

Types of Fabrics produced

During the 20 years of its existence, out of which 10 years may be taken as the real period of development (because there was no development during the war due to the absence of imports of machinery), the industry has made very great progress in the variety and quality of its products. In the initial stages only coarse and cheaper types of fabrics were manufactured But today the indus try manufactures practically all the varieties of rayon fabrics that are in demand in the country. Finer fabrics like Georgette, Crepe-de-chine and Ninon, heavier fabrics like Satin, Jacquard Woven Brocades, and cheaper fabrics like light shirting and Tafetta, of which the common variety is known as Shioze are now being manufactured by the bilk Weaving Mills located in the different, parts of the country. It can now be stated that rayon weaving industry in the country is capable of meeting practically all the

requirements in quality, variety and quantity of rayon fabrics consumed in the country. It has, therefore, made the country independent of imported rayon fabrics

Possibilities of Exports

As already stated in the preceding paragraphs, the indus try is capable of exporting fabrics valued at more than the total value of the imported yarn which it utilizes. With the growth of the spinning industry in the country, our dependence on foreign countries for rayon varn will diminish and the industry should be able to export its fabrics in larger quantity and earn more foreig exchange for the country without having to spend any foreign exchange on the imported yarn. Even now the exports of rayon fabrics are progressively increasing and n abbouring countries like Ceylon, Burma, Malaya and East Africa are demanding rayon fabrics woven in India, in eve increasing quantities. In this manner the rayon weaving industry is very ably following the example of the cotton textile industry in establishing and maintaining markets for Indian poods abroad

Rayou Spinning in India

It will be observed that we already have an established weaving industry in the country and thus a ready made market has already been provided for the products of the rayon symming industry. The first stage of the development of the rayon industry has already been completed and the second stage, viz. development of the symming industry





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Telephones 25282 - 28214 has also commenced with the establishment of three rayon factories which are respectively, located at Perambavoor, Hyderabad (Decean), and Bombay. It is stated that the capacity of all these factories is of the order of 15 tons per day or 450 tons per month or more than one errore lbs per annum. It is thus apparent that in order to supply all the rayon yarn requirements of the country we need 7½ times as much production of rayon yarn as is proposed to be achieved by the establishment of these factories. There is, therefore, scope for at least 15 more factories of the type that are under erection. In other words, if India can produce 40,000 tons per annum, she can be self sufficient in the entire field of the rayon industry.

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in the history of the Indian Cotton Textile Industry (1700-1950)

(William III, Chapter A, Act 11 and 12)

An Act was passed prohibiting the impor

ration of printed calicoes from India in

This led to the importation of plain calicoes

(George 1C1) An Act was passed probbring the use and we'rr of printed calicoes

and imposing a penalty of £5 for each

from India to be printed in England

subject to 5 per cent

Commerce in India

Duty on twist and yarn raised from 5 per

cent, to 10 per cent ad valorem on the te

presentation of the European Chambers of

1860 .

Page H ndred and fifty lour

Great Britain

1700 .

1721:

1861:

1862 :

Import duty on cotton yarn r luced to 5

per cent, as the spinning m | began to

grow and as it was thought the 10 per cent

would give protection to the mills. The reduction of duty on yarn we ertainly of

advantage to the handlooms 1 t the con-

sideration of reducing the d s was the danger of the growth of spon a mills

minufactured in India were to be taxed at the uniform rate of 3) per cent

(2) All yarn imported or manufactured in

instead of 5 per cent

India to be free from duty

Country wale. Su adeshi agitation

ned 10 3

m peece

Import duti on cotton varii r

per cent and importality or

	offence on the wearer and of £20 on the		goods reduced to 5 per cent
1771 :	seller of such goods in Great Britain (George III C72) The Pirhament laid flown that cotton goods for sale in Figland	1871 .	Import duty on piecegissis a cent and twist and yarn 31 per cent a sport Duty on cotton piecegoods of Indamonate ture 3 per cent
	should be mide wholly from cotton spun and woven in the country (i.e Foglind) Unless for exportation the import of Indian made goods was not permitted	1875 :	Tariff Valuation of imports of aton goods lowered at the request of the Manchester Chamber of Commerce (total duty that mished by £88,000)
1797-1813	Levy of duties in Grent Britain ranging is high as 85 per cent on white calicoes muslins, and the total prohibition of dyed and printed goods	1875 : '	5 per cent duty imposed on import of pytian and American cotton in India, to prevent Iniha from importing such superior cotton and competing with Manchester in
1823 :	Levy of inland duty on Indian piecegoods at 73 per cent till 1823 when it was reduced to 23 per cent, while the imports of piece goods from Great British were charged a duty of only 23 per cent		her fine goods
		1878 :	Import duty on raw cotton removed, ex- emption of coarse cotton goods from import duty. Sacrifice of revenue of more than a million pounds sterling
	This had the desired effect of stimulating imports of piecegoods from Great Britan and the decline of the Indian Industry	1682 :	Triumph of free trade, import duty on cotion piecegoods and yarn abolished in India
1825-1832	 Imposition of 10 per cent ad valorem duty on Indian goods in Great British 	1893 :	Closing of the mints to silver, which dis located the Indian yarn trade with China and Japan
1835 •	Levy of 21 per cent import duty on cotton goods in India	1891 .	import duty of 5 per cent ad talorem on
1843 :	Levy of heavy transit duties on Indian goods in India amounting to 171 per cent		of 5 per cent ad valorem on cotton yarn of counts above 20s, and 5 per cent ad valorem.
1846 •	Repeal of the 10 per cent dury in Great Brita n		excise duty on all machine made cotton yirn of counts above 20s manufactured in India
1859 ;	Imposition of a general import duty in India of 10 per cent ad calorem, including precegoods, cotton twist and varn being	1896 1	Rate of import duty on cloth reduced to 31 per cent (1) All woven goods both imported and

1906:

INDIAN COTTON TEXTILE INDUSTRY - CENTENARY VOLUME

1910 . Enhancement of the duty on silver in 1910 by the Government of India which was detrimental to the trade with the Fu East The use of Indian yarn in China was displaced by Japanese yarn

General tariff raised from 5 to 7½ per cent, the duty on cotton manufactures remaining

the duty on cotton manufactures remaining the same (3½ per cent)

1917-18 · Import Duty on cotton manufactures raised from 3½ per cent Excise Duty remaining at 3½ per cent

1920:

1927 -

Rupee Pound ratio fixed at 2x per rupee in the teeth of strong opposition and the main tenance of which led to the fruttering away of Gold Assets worth Rx 78 crores. The ratio could not be maintained and ultimately the Government threw their hands up in despair in 1924 and abandoned the attenint

1921-22: Owing to a deficit in the budget, General Import Duty raised to JI per cent, import duty on cotton piecegoods raised from 7' per cent to II per cent Excuse Duty remaining at 3\frac{3}{2} per cent, 2\frac{3}{2} per cent unport duty imported on mill machinery and stores used in spinning and wearing

1922-23: General tartif raised to 15 per cent, import duty on cotton remaining at II per cent and the Excise Duty at 34 per cent Duty on machinery also at 25 per cent

1922-23 · Duty of 5 per cent imposed on imports of cotton yarn

1925-26: Suspension of the notorious Freise Duty which was leved from the year 1896 on wards, with effect from the 1st December 1925, and its total abolition in 1926. This duty was imposed at the behest of Lanca shire and was continued in spite of strong opposition from all quarters. The Freise Duty was 'unreservedly condemned by the Indian Fiscal Commission, in 1921. 22. Total Excise Duty Leved on Indian Mill made. Goods from 1896.97 to 1925.26 amounted to Rs. 22.28.39.150

Fixation of the Evchange Ratio at 1s 6d by obtaining majority of the votes in this Assembly in their attempt to maintain it at any cost, Government had to resort to artificial contraction and imamphation of currency. Loss of Gold Assets Intered away for maintaining exchange at 1s 6d between April 1926 and November 15, 1936 amounted to 33 crores of rupes. The fixing of the ratio at this high level versalversely affected the industries of India sir virtually conferred a bounty on the foreign manufacturers at the expense of the Indian Industrialists.

1927: In the middle of 1927, the Report of the Tariff Board appointed to examine the question of granting protection to the cotton textile industry was published. Government imposed on imports of rotton yarr, in September 1927, a duty of 5 per cent or 1½ anna per 1b whichever was higher This was a very halting measure and hardly proved of any assistance, except perhaps to the spinning mills.

1930 -Duty on yarn continued till 31 3 1933 After several years of continued appeals by the Botnbay and the Ahmedabad Mill owners Associations for the grant of protection to the cotton textile industry which was in the throes of acute depression since 1923 and which suffered immense losses during the period, the Government of India passed an Act in April 1930 by which they increased the revenue duty on imports of cotton precegoods from 11 per cent to 15 per eent generally, and imposed in addition a further 5 per cent protective duty on piecegoods not of British manufacture, with a minimum of 34 annas per lb on plain grey goods irrespective of the equiter of origin

1933 · Mody Lees Pact concluded

1934 · Indo-Japanese Trade Agreement concluded on 12th July 1934

1936. Indian Tariff (Second Amendment) Act passed

1939 Indo-British Trad. Agreement signed on 20th March 1939 Indian Tarif (Third Amendment) Act, 1939, passed to implement the above Agreement Protective Duties continued upto 31 3-1942 and later two 31 3-1947

 Control over cotton cloth and yarn intro duced in June 1943 by the Cotton Cloth and Yarn (Control) Order, 1943

1947 Protective Duties allowed to expire at the end of March 1947 after a triff enquiry in 1947 Protective Duties on cotton cloth ind yarn were converted as revenue duty with effect from 1st April 1947

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1949: Protective Duties discontinued from 1st April 1947, except on piecegoods of irt silk and of cotton and art silk mixed. Duties on art silk piecegoods will continue till the 31st March 1951
Regione of protection to the Cotton Textile Industry against imports of cloth and yarn which commented in 1927, ended on 31st March 1941.

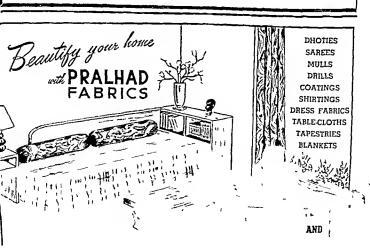
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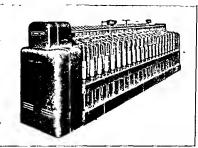
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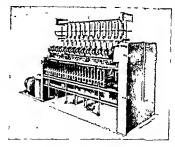
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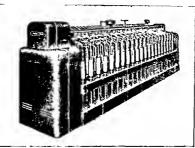
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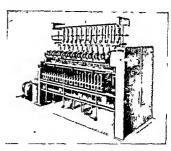
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- ★That the productive capital employed in the Cotton Textile Industry in 1947 was Rs 132 crores, Rs 52 crores being fixed capital, and Rs 80 crores being working capital Of these Rs 52 crores, Rs 205 crores represent land and buildings, Rs 30 crores plant and machineri, and about Rs 15 crores other fixed assets Of the Rs bo crores productive capital, Rs 58 crores represented stocks of raw material and fuels, and Rs 22 crores stocks of products and by products
- ★That the industry employed nearly 7,00,000 workers, of whom 99% were directly employed by factones, and 1% were employed through contractors Of these 4 lakhs were employed in Bombay, 93 000 in Madras 60,000 in Utar Pradesh, and 32,000 in West Bengal The number of women was 67 000 roughly so°c of the total labour force
- ★That the total number of man hours worked in 1947 was 1,55 0,000 000 The total salares and wages (including bonus and other cash payments) of workers (men women and children) amounted to Rs 50 crores, of which Rs 54 crores were received by men, Rs 4,7 crores by women, and Rs 7 lakhs by children The total amount received by workers was as follows Bombas Rs 42 crores, Madras Rs 63 crores, Uttar Pradesh Rs 41 erores, Baroda Rs 22 crores, and West Bengal Rs 196 crores
- *The amount of coal consumed by the industri was 14 00 000 tons (value Rs 4 36 crores), firewood 10,000 000 tons (value Rs 13 lakhs), and fuel oils 4,07,00 000 gallons (value Rs 122 crores). The amount of electricity consumed was 77,00,00,00,00 k.W.H (Rs 25 crores) water 390 crores gallons (Rs 32 lakhs) and lubricant oils 21 lakhs gallons (Rs 60 lakhs). The value of total fuels etc was Rs 9 27 crores.
- ★The total amount of basic maternals consumed was as follows. Catton amounted to 33 lakhs bales (Rs 100 crores) of which 15.4 lakhs bales were 27/32 and below, 10.2 lakhs bales were 7/8 to 1', and 7-4 lakhs bales were long staple over 1 Of these, 19.8 lakhs bales were long staple over 1 Of these, 19.8 lakhs bales were consumed in Bombay, 5.33 lakhs bales in Watars, 3.45 lakh bales in Uttar Pardesh
- ★The amount of cotton yarn consumed was 2.02 crores pounds, and artificial silk yarn consumed was 1.2 lakbs pounds. The total amount of yarn consumed was 2.18 crores pounds (Rs. 5 crores)

- The tallow consumed was 60,000 cwts (Rs 47 laklis), China Clay 64,000 cwts (Re 5 lakhs), Sodium Hydrosulphate 18,000 cwts (Rs 21 lakhs) Caustic Soda 6.500 tons (Rs 24 lakhs), Soda Ash 4,000 tons (Rs 20 lakhs), Bleaching Powder 77,000 tons (Rs 15 lakhs), Common Salt 3,89,000 maunds (2/7 lbs) ts (Rs 6 (Rs o lakhs), Sulphuric Acid 39,000 lakhs), Starches (all combined) 33,000 ns (Rs 3 sulphur crores), basic and direct colours 3,000 colours 6,000 cwts, Vat Indanthrene ir Naphthol Colours 8,500 cwts, the total quantity cl lours con sumed being 20,000 cwts (Rs 3 crores)
- *The number of pickers consumed was * 2008 (Rs 47 lakhs), Bobbins and wooden two (Rs 18 croces), Shuttles 6,500 gross (R 6 lakhs), Healds 23,00,000 (800 eyes) (Rs 60 lakhs) Red 46,3000 (1,000 dents) (Rs 19 lakhs) The total ex factory value of materials consumed by was Rs 136 crores
- *The total production of varn, whether for ale or for further manufacture was as follows in 194"

Upto 30 counts	83 erores lb	
31 to 50 counts	22 erores lt	
51 to 90 counts	b erores it	
Over 80 counts	3 crores lt	s
the total being	113 erores Il	15

- ★The total production of woven piecegoods for sale in 1947 (excluding products used in the factories) was 314 ecroes yards, or 7 rotres lbs. The total quantum of piecegoods sold and delivered during 1947 was 70 crores lbs or 308 crores yards.
- ★The total ex factory value of woven piecegoods sold and delivered in 1947 was Rs 181 erores, and of all products and by products (including woven goods other than piecegoods, housers, thread, cotton waste, etc) was Rs 243 crores Of the total production of piecegoods, 44 9°, was gree, 51, fance, 4% prints
- *Over a third of the total output of piecegoods consisted of shirtings and longeloth, over a lifth of thouse and over a scenth of sars of special spec

★The old du the	dustry 43%	5% of the pro employed the census
manu		Gc

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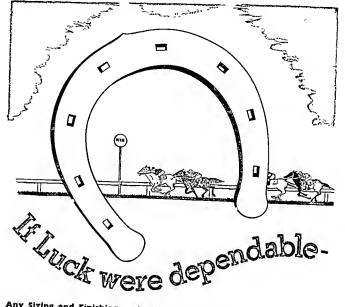


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SURVEY OF THE COTTON TEXTILE INDUSTRY'S POST-WAR PLAN FOR EXPANSION

The total spindleage involved in the expansion of the Cotton Textile Industry, including spindles covered by licences granted for orders placed prior to the publication of Government of India Resolution No 205-TA/45 dated 4th May 1946 on the Post-War Plan comes to 310 million spindles approximately Although imports of spinning machinery were licensed to the extent of about 2 57 million spindles the pace at which progress has been made with the actual implementation of the Plan has not been as satisfactory as one might have expected commensurate with the licences issued. To begin with orders were heavily booked with the UK manufacturers and deliveries offered were of necessity long drawn out the source of supply being restricted. After the Indian Trade Delegation visited Japan in 1947 and the first hundred thousand spindles were booked by Government with the Japanese manufacturers offers for further supply of machinery through trade channels were received and accepted Many of those who had provisionally booked their orders with the Indian Textile Engineers Ltd, the local representatives of the Textile Machinery Manufacturers in UK, then turned to Japan. The Indian Textile Engineers consequently considered it neces surv to obtain an advance from those who were willing to book firm orders so that a more realistic programme of deliveries could be offered to the licensees and an order of priority made out on the first come-first served basis. This resulted in bookings with U.K. dwindling, partly owing to earlier deliveries being offered by Japan and partly because the prices for Japanese machinery were more attractive

Capital being shy, many of the entrepreneurs found the problem of raising finance very difficult and were, therefore, unable to finalise their contracts for the purchase of their machinery while others appeared to be optimistically looking forward to a fall in prices. On the other hand, with the devaluation in September 1949, the unfavourable exchange rate has caused a further full in the trade activities with Japan. The prospects of reduction in prices that our new Industrialists had ardently hoped for not being likely to materialise in the near future, we are being treated to the uninappring spectacle of many a wary promoter still continuing to be stiting on the fence, a perch from which the State Governments would appear to be chary of removing them owing to their mability, apparently, to find new promoters who are likely to do any better! While these are some of the reasons for the lackdasuscal attitude on the part of the entrepreneurs chosen by Government to go shead with their project under the Post-War Expansion Scheme, the Government policy adopting the Tariff Board recommendations on the Indian Textle Machinery Manufacturing Industry and the miterial imposition of a bain by the Ministry of Commerce on imports of ring frames caused a further setback to the progress of the Plan

Shortage of Cotton may well be cated as one more reason for the misspurings of the promoters with regard to the future and the implementation of the Plan being retarded to some extent. The improved trade relations with Pakistan should, however, ease the situation in due course, as the promoters should be well assured of their share of imported cotton. Further, the disturbed equilibrium of the economic conditions of the Punjah and West Bengal have contributed not a little to stagnation in these regions.

With the merger of the States it has been difficult to clearly demarcate statistication of spindles. The accompanying statement is an attempt at the nearest approximation of allotments made to the various Provinces and States (wide Table 'A') and a general review is given herebelow against each group.

This is a deficit zone. There is not a single null to supply cloth and yarn to the people of the Province. Against an allotment of 1,00,000 spindles for Assam, the State Government planned to install 75 000 spindles under their sponsorship. Priority assistance was given by Government for the early

PROCRESS
RETARDED
BY
ABNORMAL
CONDITIONS
SINCE
PARTITION

ASSAM

INDIAN COTTON TEXTILE INDUSTRY - CENTENARY VOLUME

delivery of 25 000 spindles but it now transpires that they are unable to undertake the project. They have asked for assistance for the transfer of the machinery to some other party. The position with regard to Assam is, therefore, nebulous and uncertain

There are only two mills in this State. An allotinent of 2,43,000 spindles was made including 25,000 for Scraikela State and the ex-gratic allotinent of 5,000 spindles in favour of Buxar Central Jal. Buxar Jal have received their machinery out of the quota of spindles that the Government of India had ordered from Japan. Of the rest of the entrepreneurs who are not likely to implement the Phan, the Government of Bihar have recommended cancellation of 1,50,000 spindles allotted to six of the promoters. These are available for restlection time.

Surat Textiles Ltd, a new mill of 10,000 spindles granted under Auto new mills which have come into existence in Bombay Four new units of 12,000 spindles are the only new mills which have come into existence in Bombay Four new units of 12,000 spindles each were allotted for the purpose of ensuring yarn supply to handloom centres. None of these promoters have taken any action. With the merger of Palanpur, Baroda and Cambay, Bombay's share of the allotment of spindles under the Plan comes to 458156. Some of the existing mills are, however, likely to utilise their allotments for expansion to the extent of about 50 per cent of the spindles distributed to them. Under the recommendations of the Government of Bombay, cancellations of spindles earmarked for expansion of existing units have been carried out to the extent of 17 000 spindles.

Five new mills comprising 10,000 spindles and expansion of the 3 exist ing units to the extent of 20760 spindles were sanctioned out of a total spindleage of 1,51000 allotted in favour of Madhya Pradesh. In the passart state of financial strangency the State Government are of the opmont that it is a matter of great double as to whether the new mills are likely to come into existence in the near future. They are not confident of being able to find alternative promoters to undertake the responsibility of setting up new mills in Madhya Pradesh. The lasses-faire policy of the State Government is, therefore, not likely to lead to any fulfilment of the aspirations of the Post-War Plan in this region.

No regular allotment was made under the Plan for Delhi A mill of 25 000 spindles styled the Swatantra Bharat Mills and sponsored by the Delhi Cloth Mills has, however, come into existence This was booked under the Automate Registration prior to 23rd December 1944 Basheshernath and Co and Ajudhya Tevtiles were subsequently given 20,000 and 12,000 spindles respectively, the former of whom has applied for an import licence for a small reconditioned plant from UK. The Chief Commissioner, Delhi, is not hopeful of any further progress being registered in this area for the time being

Out of a total quota of 2,46,508 spindles allowed after partition, only 13,000 spindles have so far been distributed. As already stated, owns to the disturbed state of the economic condition of this State on the border of Pakastan, the Provincial Government seems unable to predict the future of the Post-War Pfan as far as their promoters are concerned. It may be necessary to consider the possibility of transferring the unallated spindles to the pool for distribution, later, to other States who may be in a position to show more tangulbe progress in the sphere of industrialisation.

Although at the outset the Government of Madras seemed chary of accepting spindles allotted to the State for industrial expansion, they have made considerable progress after the initial state of inertia. Madras have received a total quota of 481,000 spindles including the Pudukottah State and the spindles allotted under Automatic Registration. As many as 161,000 spindles have already been installed and a further quota of 76,220 spindles are expected to be erected thus year. It might be said to the credit of Madras that more than 50 per cent of the sanctioned spindlesage is expected to be utilised.

Orissa's quota is 1,44,600 spindles which includes Mayurbhanj State Messrs Mayurbhanj Spinning and Weating Mills have imported a reconditioned plant of 10,900 spindles from UK. Messrs Orissa Textiles Lith hate placed orders for 45,000 spindles, out of which 19,000 have been received and erected. A further list of 10,000 spindles is expected during 1950. The other promoters are like their neighbours in Bihar indifferent, and the Orissa

BIHAR

BOMBAY

MADIIVA PRADESH

DELHI

EAST PUNJAB

MADRAS

ORISSA

Government have attributed this to the difficulty of raising capital and it appears doubtful if the rest of the new milfs are at all likely to be set up

Out of a total quota of 2.72 000 spindles allotted to Uttar Pradesh only 2.21 720 spindles were distributed 66 300 spindles for expansion and 1.55 420 for new mills Amongst those who are taking action for the expansion of their units are

(1) Campore Textiles Ltd Kanpur (11) Lakshmuratan Cotton Mills Kanpur

The only new mill that has come into existence in this region is that of Modi Spg and Wkg Mills at Modinagar (Meerut). This is sponsored by the well known industrialist Shri C M Modi who has imported and installed the first of the units of the spinning machinery of the H & B Machine Co of America the Indian Agents of whom are Messrs Mahindra and Mahindra Ltd Bombay. The second plant of this kind imported from USA is under erection in Desanger in Missore State.

A quota of 294-612 spindles was allotted to the share of West Bengal after partition. This includes the ex-gratic allotmosts. No appreciable progress has been made by the promoters of the new mills as compared with Bengal Governments claimour for increased allotment. Mesers Kalyan Spig and Weg Mills have put up a plant of 12 000 spindles (second hand) purchased from Atmedabad. Under expansion Bangeswari Cotton Mills and Rampooria Cotton Mills to so of the existing units have imported and installed 8 000 and 2 000 spindles respectively. The Annapurria Cotton Mills and 13 500 spindles respectively from out of the quota of spindles purchased from 13 500 spindles respectively from out of the quota of spindles purchased from 13 papan under Government account and all these spindles have since arrived The State would however appear to be in the throes of financial distress consequent upon the difficult times they have been passing through as a result of the partition of the country and its aftermath particularly the problem of refugees from East Bengal since May 1950.

An allotment of 30 980 spindles was made for new mills to be installed and old mills to be increased in size under the Plan. Padmavati Raje Cotton Mills Nagde is the only new mill of 19 000 spindles that is coming up

Owing to uncertain conditions as in the case of Punjab and West Bengal the promoters in this region have displayed no sense of keenness in taking any active unterest in the Post War Plan. Messrs Shamji Karamsi Natha and New India Industrial Corporation Patials have actually aban doned their plans. Messrs Karamchand Thapar and Sons have however been further allotted 19 000 spindles to enable them to increase the size of the mill they are putting up at Kapurthala which will now be one of 44 000 spindles 17 800 spindles are expected to arrive in 1930. Apart from this milliners is httle chance of any other mill being installed in the near future in this zone. There will therefore be a balance of 50 000 spindles available for appropriation.

A quota of 25 000 spindles was assigned to this State but has since been cancelled

The total number of spindles allotted under the Post War Plan fon new and exasting mills in this area is 11 Tr3 Apart from the existing mills which are likely to utilise the spindleage allotted in their favour for expansion there is no sign of any promoters of new mills taking energetic action for the implementation of the Plan Japur Spg and Wey Mills have since transferred their hience for 10 000 spindles in favour of Binod Mills Ujiam. They have an additional quota of 10 000 spindles which they expect to utilise themselves

A quota of 90 796 spindles has been allotted to Saurashtra Atthough the State Government clamoured for an increased allotment hardly any of the existing promoters have taken any concrete measures to utilise the spindles allotted to them. One of the new allottees Khetam Industries how ever appears to be very keen on putting up a spinning mild of 12 000 spindles at Rajkot. They have previous mill experience as they had a small spinning mill in Ahmedabad for a number of years. This unit is now idle and they propose to transfer at to Rajkot and build around it to increase the size of the mill to 12 000 spindles. The question of transfer of the Ahmedabad Unit to Saurashtra is under consideration with the Bombay Government.

UTTAR PRADESH

WEST BENCAL

MADIIYA RHARAT

PEPSII

BHARATPUR

BAIASTHAN

SAURASHTRA

VINDHYA PRADESH

TRAVANCORE &

Only one rull of 25,000 spindles was sanctioned to this area in Rewa in favour of Asoka Textiles and Industries Lid. The State Government do not appear to entertain any hopes of the promoter making good nor have they been able to select another party to take their place.

1,04,033 spindles is the share of the United State of Travancore and Cochin Of the total, only 83,033 spindles have been distributed In Travancore, a mil of the name and style of the Balearama Yarma Textiles of 12 000 spindles has been installed A further lot of 2,640 spindles is expected to arrive this vear. The other spindles utilised are—

(i) Vijaya Mohmi Mills 6 400 spindles (New)
(ii) Alwaye Textiles 5 000 spindles (Expansion)

In Cochin, the Cochin Mahalakshmi Mills comprising 2,500 spindles, has been

A quota of 95,624 spindles was allotted to Hyderabad under the Post-Mar Plan. No progress has been made by any of the promoters. This stalemate is doubles due to political changes in the State and the uncertainty that prevailed during the change over. It is possible that the existing mills may, in due course, take action in the matter of balancing and/or expanding their existing units. MSK Mills Gulbarga, have purchased from Government a unit of 8,000 spindles which were imported under Government account.

> Kapila Textiles 15 000 spindles Shri Ganesar Textiles 17,200 spindles Sri Sankara Textiles 17,800 spindles

Mysore may well congratulate itself on the progress it has made

As many as 14 new mills were sanctioned prior to the drawing up of the Post-War Plan, out of which only six have come into existence. Some mills have sprung up under the provisions of the April 1947 Notification in which the Government of India sought to encourage new-comera who produced evidence of their ability to import new or second-hand reconditioned machinery outside the quota on the basis of which they were sanctioned ex-gratia allotments

Twenty-one of the existing mills have implemented their programme of expansion which involves the addition of 1,39,612 spindles. The new mills established already and those which are expected to be erected during 1950 are 43 in number comprising a total of 5,04,560 spindles. There is still a balance of 5,27,458 spindles remaining to be resiliotted. (wide Table 'A' on the next base)

If the protagonists of the Post-War Plan for the expansion and rehabilitation of the Cotton Trettle Industry had envisaged the consummation of the Scheme within a period of 5 years, as they would appear to have done, they would doubtless be somewhat disappointed at the results. The above factual review reveals that there is yet a lot of ground to be covered and it may take a long while still for the fulfilment of the Plan to be accomplished. Although there is nothing to enthuse over, considering that the plan of expansion was conceived before partition, under normal conditions, and that radical changes have since taken place in the economy of the country to upset all calculations, the propress made cannot, at any rate, be described as insignificant.

As the expansion aimed at the target of production of 1,700 million yards on the basis of the increased spindlesage provided for, so as to ensure the perceptia consumption of 18 yards, it is clear that the Plan should at all events be carried out to its finality. As a result of the war, and the devaluation of our currency, in September 1343, we have found a world-wide market for export of our textiles. With the expansion of our export trade, therefore, it is all the more necessary that India should take suitable measures to implement the programme for expansion of her cotton textile industry at an early date. (See Table & Graphs on opposite page)

HYDERABAD

MYSORE

SUMMARY

REVIEW

OF

EXPANSION

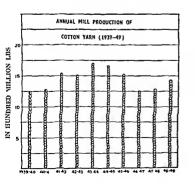
INDIAN COTTON TEXTILE INDUSTRY—CENTENARY VOLUME

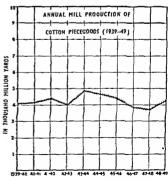
TABLE. A

Existing and Projected Spindleage Capacits of the Cotton Textile Industry
in India (1950)

	Installed C	apae ty	Plan Plan tomat ornal sent)	2=	\$ 2 10 10 10 10 10 10 10 10 10 10 10 10 10	1 to 0	Ī	
STATE	Sp nd as	Looms	Quota Senetioned under the Plan (volud ng Automat Reg etnat on & ex quota allotment)	Quota allotted t m l s/promote	No. of Bribales expected to be util ed	New epodles star- led race red and/ or areofed	Spladies expected dur ng 1950-51	Belanca Spindles avei able for redistribation
Assam	, -	1	1 00 000	1 00 008	25 000		25 000	
B her	27 797	715	2 43 000	93 000	43 000		5 000	1,50 000
Bombay	58 12 697	1 39 678	4,53 156	4 41 156	2 51 572	16 000	15 000	17 000
Madhya Pradesh	3 81 748	6 875	1 51 000	1 21 60	79 656	-	10 000	2000
Delb	13 696	3 131	87 000	57 609	25 000	25 000		
East Punjsh	37 494	752	2,46,608	61 300	10 000			1 65 20
Madras	16 05 396	633	4 81 900	4 88 270	2 76 960	1 61 000	76 220	73
O lesa	-	1	141000	1 44 000	94 900	19 000	20 000	
Uttar Pradesh	7 35 495	12 133	2 *000	2 91 700	83 830	P\$ 000		50,280
West Bengal	3 75 660	7 690	291612	294612	2 73 476	27 000	66 000	
Madhya Bharat	3 93 508	10 414	30 990	30 960	39 990			M4
PEPSU .		_	84,000	44 000	44 000		17 600	60 000
Rajasthen	63,320	1 231	1 17 776	1 17 778	52 03	-	10 117	
Baurashtra	1 43 090	2 910	90,796	90 978	\$9 804	3,500	9 440	
\ mdbys Pradesh			25 000	25 000				-
Travanco e & Coch o	73 262	7 6	1 04 033	63 033	53 000	26 000	2610	21 000
Hyderabad	1 18 420	2 457	95 691	76 621	26 624	B 000		19 000
Myro a	1 63 759	237	71 136	71 138	67 336	50 000	ĺ '	-
Baga at	-	I	25 900		-			52 004
Grand Total .	100 44 418	1 68 454	31 01 621	25 74 163	14,54 562	3 99 600	2 66 012	6 2" 43

The graphs below show India's annual production in terms of cotton yarn or piecegoods





Page Hundred and s sty five

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Looking Forward...

HARDLY any industry in the world's history has had to face at its first centenary a combination of crucial problems such as now confront the Indian Cotton Textile Industry It is true, looking back over the history of the past hundred years one eannot help feeling amazed at the substantial achievements of Indian industry. Time was when imported cloth was the commonest clothing and the patronage of Indian goods required a heroic effort at self-abnegation Self sufficiency in cloth was but a dream, nebulous, distant and visionary. Men dared not think of exports of Indian cloth, except in fond and feeble remembrance of a bygone age. Now all that is gone Though we do not ban imports today, it is not that we eannot do without them. We may not have a plenitude of Indian cloth, and memories of acute war time shortage linger uneasily in our minds. But we have enough to make the stocks go round And as for the foreign markets, men do not swear by Indian cloth Indeed, it is said that sometimes they swear at them. But Inilia is one of the three biggest exporters of cotton goods today, vying with the United States, and the United Kingdom, and leaving Japan, at the moment at any rate, far behind The prospects of further indefinite projection of these trends are hy no means negligible. Ignoring problems which, as preoccupations of the moment, necessarily foom large in our minds, production may well show vast increases Not only can the per capita consumption of cotton cloth increase in the face of an increasing population, but we may have a larger exportable surplus, produced at prices which will bear competition

Basic Conditions of Industry's Progress

Past achievements and future possibilities are able impressive and inspiring. But there is a concentration of circumstances which make the present bristle with problems of a wide range and scope and of crucial significance. While experts, interested or otherwise, grapple with these problems, it is of immense importance that the public should have a fairly clear perception of the nature of these problems, their inter relations and interactions, their bearing on what is loosely termed the national economic problem. The first point to seize is that the basic conditions in which we in the past imagined the growth and development of the Indian Cotton Textule Indiatry we changed almost beyond recognition. We assumed then a plentitude of raw material such as involved no question of encroach ment on Indi for other purposes a terrific pressure of

imports which it was hopeless for Indian goods to displace except with the aid of high tariffs and, what goes with it, the virtual impossibility of an export trade. None of these conditions is as true now as a decade or two ago. We have at present veratious problems of the supply of raw cotton We have to consider the rival claims of food crops and eash crops on the total acreage available for cultivation Imports at one time were not obtainable. And exports have risen to the point at which it is necessary to consider the levels of exports which can be deemed feasible and desirable from the point of view of the national economy as a whole Considering the need for imports of raw materials, the way cotton cultivation has impinged on food cultivation and the problem of our food supplies, and the new found feasibility of exports of cotton goods, cotton and cotton goods bear an altogether different relation to our foreign trade problems than in the past. Indeed, the problems of cotton and cotton goods are inter woven with the problems of our national economy in a radically different The designs and the patterns are far different

By far the most potent source of these changes is the poli tical partition which has shorn from India her sources of long staple cotton and converted a considerable part of the home market into a foreign market. These effects of parti tion came on top of the nexus of controls which had been imposed as a result of the conditions of the war period and which have continued to be necessary ever since. Control of cotton cloth and control of raw cotton have been linked together because control of cotton goods prices would be impossible without the control of the prices of the raw material An independent reason for the latter is the restriction of acreage for purposes of increasing food production. The control of cotton cloth prices also involved the control or regulation of production and the long story of Government attempts to determine production in accordance with the needs of the common man as the Government conceived them the failure of those attempts, the period of sharp changes in the direction of control and decontrol, all these make up one phase of the secent history of our cotton textile industry which could be for gotten, but for the aftermath which it undoubtedly has

Indigenous Production of Raw Cotton

Partly on account of the past development in regard to control and on greater part on account of the partition and the undependability of supplies from Palistan India has at the moment the need to look into the sources of her raw cotton supplies and determine the basis on which the tex tile industry can meet its requirements of the raw material It is certain that India cannot replace the supplies of long staple cotton with her own production except over a period of time, in which she has of necessity to import cotton from Egypt, USA, and other countries, that is, if, when and to the extent, supplies from Pakistan are unavailable. There is a certain degree of confidence among experts that Indian agriculture can switch over from the production of short staple to long staple cotton and meet the requirements of the Indian industry in respect of long stiple cotton. But the problems flowing from such a change-over are important to the future of our national economy. To the first question whether the change will involve an increase in the acreage under cotton which will necessarily be at the expense of food production and the necessary increases therein, the answer is a welcome negative. To the next question, whether it would lead to a cut in our export sur plus of short staple raw cotton the answer would seem to be more that such a cut should be welcomed than that it could be avoided. The advantages of India being able to find her requirements of raw cotton within the country however, far outweigh any possible disadvantages. For internal production of raw cotton would mean the climina tion of imports which are costly politically and economical ly alike, and the possibility of Indian cotton goods improving the position they have recently gained in the foreign markets. The expansion of India's exports of cot ton goods depends directly on her ability to produce more of fine goods and at lower prices than at present. The quantity of fine goods is reduced by the difficulty of procuring long staple cotton, while costs are put up by the high prices we have had to pay for it It is clear, therefore, that the production of long staple cotton at home would relieve the country from the embarrassing predica ment she found herself in, only too frequently during the last few years

Problem of Raw Materials

Of the crucial problems facing the industry today, that in regard to the supply of raw materials is, of course, the first and foremost. The wornes under this head are on different planes. The lowest and the most immediate is the problem of ceiling prices, which fortunately has only

recently been satisfactorily settled. The next is the problem of prices of cotton goods, the revision of which has exercised the minds of the smaller or the less efficient units. Uninterrupted supplies of raw materials, remunerative prices and help in finding and holding foreign markets constitute the principal requirements. No longer is it a matter of extension of protection. Entry into export markets is adequate proof of that. But as in most cases, there is a point at which long term and short term problems should be considered together in some kind of combination If we do that, the industry can ignore the head tokes caused by partition, forget the purpricks and the autoyances of official controls and look forward to the day when it can meet in full the requirements of the market and at the same time far from causing a drain on our foreign exchange, actually make sizeable contribution to it

Cotton Industry's Laport Potential

The dawn of that day will depend firstly on the produc tion of long staple cotton in adequate quantit is within the country and secondly on the ability of the industry to utilise it in economic production. It is in respect of the latter that preparation seems yet to have been madequate The technical efficiency of Indian mills has it i made any progress in Leeping with the expansion of its apportunities. Today as we began by pointing out India is one of the big gest exporters of cotton cloth in the world. The British Cotton Textile Industry is no longer the threat that it was to the Indian industry. Japan has been wiped off the map for the present though her come back must be deemed significant. American competition is hampered by the world wide scarcity of her currency India has all the advantages that one could desire so far as international conditions are concerned. And there is within the country a trend of events which, through food shortage and other attendant problems, must make India a great exporter of manufactured goods. The industry which is in the fore most position to help the nation to realise this destiny, is the Cotton Textile Industry Even more than the public and the Government, the industry has to acquire a new outlook and a new faith and forge ahead. The difficulties in the way are bound to be swept aside, once a determined effort is made in that direction

THE END

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Lduor M. P. GANDHI, MA, FRES. FSS. JP

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With an Introduction by Sir M. VISVESVARAYA, Kt., LL-D.,

Prendent The All-Inde Manufacturers Organization Bombay

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MILLS IN AHMEDABAD
OTHER MILLS IN BOMBAY STATE
MILLS IN OTHER STATES
MILLS IN COURSE OF ERECTION

COTTON MILLS IN THE CITY & ISLAND OF BOMBAY

-	MANES OF MITTS	ATMLS ON THE JAMES OF THE ATMLS OF THE JAMES	F (a) Van ber of Aplial(d Installe (trenge treater of equality at most	Number of Loon's bretail d	Avirage Numler of Leome at work delly	Approximate of the canding of the canding of the canding of 784 lbs	Ai erage Attention Hande employee drilly
	Apollo Mills, Ltd., Delash Bond, Chircles gly	Mesora The Rajputana Tollibs (Agentus), Ltd., Agenta Office on Mill	47,500	42,498	494	887	12 293	1,5
ı	Apollo Mille, Litt., targette	property and the state of the same	49 Jt G	411,339	1,021	976	~ 448	1,4
	Rehardal Remotaren Cotton Mills, 1td , Ferguson		1 07 840	1 03,862	3,214	3,087	11 348	3,51
	Rosel Lower Farel Borthar Dreing and Mfg Ct., 14d (Spring Borthar Dreing and Dada Borthar Dreing and Tond, Dada Little Nagaum Road, Dada Little Textile	Raturd Patale, Fort, Bombay	71 936	66,951	1,631	1,767	1:187	3,0
	Hossi, Lower Faret Bowther Dreing and Mig Ct., 1 to Coping Bowther Dreing and Road, Dater Milds, Assgains Road, Dater Sumlay Dyenig and Mig Co., Litt (Textila Milds, Lipkinstone Road, Part Bradbury Mils, Litt, Ibpan Road, Javob Circle Bradbury Mils, Litt, Ibpan Road, Javob Circle	Mesors Ramnaram Sons, Ltd., Agents, Imperial Bank, Annexe, Bank Street Tost Bond at	14 491	32 612	814	791	* (L)	1 4:
	Century Spinning and Manufacturing Co. I til. (Century Mill). Junction of DeLiale Road and Thiuntonic Hoad Century Strain and Manufacturing Co. I til. Century Strain Lunction of DeLiale Road and	Meson Sir Chudhall Mehra & Sons Lid Agenta, Queen a Mussons Prescott Road, Fort, Bunloy	1 09 320	B+ 452	2481	2 484	3 4	5,10
	I Indianate Add Mill Company, Ltd. (Ott Mill).	Managed by Board of Directors Office on Mill premises	32.204	41.531	697	183		145
	Teloris Land and Mill Contains, I til , soundie	<u> </u>	11 376	}	,			1 69
•	Coorbi Spinning and Heaving Company, Link Kurls	Meson Compiler lelinder & Lit Ltil Ferritaria, Transiters and Agenta Realymones Mension Chirelente Street Fort Bombay	14 68u	11.41%	6811	(112	*1	1 33
	Frami Spinning und Minnifacturing Co. Ltd. (formerly Divid Mills), New Parhludes: Road Parel	Nesses Pursholam Vilhald is & Co., Secretar a, Treasurers and Agents, Sir Vilhaldus. Chambers. Apollo birect. Fort, Bombay.	-7.110	41 44IT	1,01.4	1 04,	_7	1,00
	Lower Parel	Meses Ramagain Sons 11d Aguits Imperial Bank Annexo Birik Secot Fort Bombas	41674	32,1141			(63)	1,64
	Ltd) Sun Mill Road, Lower Parel	Mesons Ramgopal Gamputnu & bons I td., Managing Agents Office on Mdl premises	36 716	33,670	786	7 sh	4.º3h	1,32
1	Digujas Spanung and Weaving In, 11d (for merly Dushaw Petri Mills) I sl Bang Parel Edward Textiles Ltti (formerly I dwart Sassoon	Mesors Jethubhat Khatau & Co (Agentus) III Agente Offici on Mili premises	43,191	43 020	1,177	1,00 t	7,490	1,58
	Julis Tru P Leadurgu Money Power True	Massa Puranmal Radiokishan & Co. Igenis, India House, 15 Dougall Road, Bellind Estate, Fort, Bombay	14,361	12,826	1128	800	14 516	1,37
1	lyhunstone Spunning and Weaving Shills Cu., Ltd., Elphinstone Road Parel	Meses Chilombaram Mulcaj & Co Lill, Agents, Kamani Chambers, 32, Nicol Road, Ballard Patate, Fort, Bombay	42 072	34,276	883	871	10,264	1,741
		Mesers James Ludy & Co Lail Agents, Chartered Bank Hulldings, Fort, Bombas	18 072	41 398	764	759	4,875	1,848
		Mesers James Finley & Co., Ltd., Agents, Chartered Bark Bligs., Fort, Bombay	40 540	32,414	1,020	844	5,130	1,651
	Huid Mills Ltd (formerly David Mills Co., Ltd.) (Mill No. 1), Carroll Road, Parel	Mesers Hand Agents Lt 1 Mg Agents Inda House, to Design! Rout, Ballard Estate, Fort, Bombay	76 142	65 918	1,017	1,103	19 837_	2,394
	Hind Mills Ltd. (formerly David Mills Co. Ltd.) (Mill No. 2) Carroll Road, Parcl.	J		-				
	Himloostan Spinning and Weaving Mills Co., 144. Rijion Road Jacob Circle.	Sir Vilkal Chambers Apollo Sirect Fort Bombay	45712	34,7811	1,516	1,121	9 270	1,665
	Hirjeo Mills, Ltd. iformerly Presidency Mills (o., Ltd.), kergison Rosst. Lower Parel	Office on M R premises	48 012	40,741	881	846	9,317	2,181
	North Jacob Circle	Mesers Damodar Thackerses Mooljen & Co. Agents Sir Vithalias Clambers Apollo Street, Fort, Bombay	19 967	46,2 40	1,167	1,018	9,733	1,977
	India United Mills, 1td , No. 1 Mill (formests 1 Jacob Mill), Superibang Ros 1 Pare? India United Mills Ltd , No. 2 Mill (formerly		987,89	86 180	2 228	\$ 0R1	20,830	3,525
	Ab vandra Mill) Gornadeo Ruad, Churchpox gly	N N	3 1,840	32,168	742	709]		1,847
	Indes United Mills, Ltd., No. 3 Mill (formerly E D Mill), Gornysleo Rosal, Chinchpaggly	House Agarwal & Co., tgcnls, India House, Dougall Pond Ballard Petate, Forl, Bornhiy	T6,459	71,944	7:2	712	26 368	1 337
	India United Bills, Itd. No. 4 Bill (formerly)				1,880	1,687		1,271
	Rachel Mill), Chinchpoorly Rosal India United Milla Lid , No 5 Mill (formerly Man cluster Mill), Chinchpoorly Cross Lane, Kala chowki		28,940	26,741	634	657	4,466	779
	Jam Manufacturing Co. 1 til , Mill No. 1, Lafbeing, Parel	Mesons Freeundas Vandraven & Co. Tressurers and Agents, Secretaries	27,21 e	23,185	910	800	4,393	1,120
	Jam Monufacturing Co., List, Mill No. 2 (formerly Birla Mills, Ltd., No. 2), Sewer Road	I athaug, Parel, Bombay	23,516	22,283	574	570	2,638	880

COTTON MILLS IN THE CITY & ISLAND OF BOMBAY

	Atar of Altr	VISITED AGENTS OF THE VERS	Tital Subserved Against In talk of	Average amber of 4 in this at work dully	Vumber of Looms Installed	Average Vember of Leoms at work day	Applicate made of testion consumers the year in consumers of the year in consumers of the year in the	Average umber of flands employed dully
3	Jubileo Mills Ltd., New Sewree Ruad	Moore Plannt White Co. Ital. Scretar restores at Lights Malarak Will Apollo Street Fort	7N 2%)	14 241	690	637	4,945	1,180
	Kanuda Mills, I td. (formerly Florational has Fabance Mills) Tulsi Papa Line Road f DeLislo Road	B () 1 1 1 1 1 1 1 1 1	16 941	35,201	1,05ა	1,020	9,254	2,342
	Chatan Makann Spunning and Weating Co. Lil Hames Road, Bleulla	Ur blitti Makanji tio, igenta, I Buli B Lallied Pier I; B Lu	41 872	*7.7¥8	1,417	1,742	8,740	2914
	Kelmoor Mills Co., I til (New 102 & 1 Mil Nagaum Cross Road, II) [17]	M. Kill I I Intra. 1 id Agents Kill k Bills. If n. Street Fort Bond 1	1 07 240	1 00 174	1 846	1 811	20,150	5 149
1	Madhown Dhuramsa Manufacturus, t Lat Foras Roul, Tardeo	Minings of for Burd of Directors 1 1.	34 712	36 764	838	627	4,600	1 732
	Shri Madhusudan Mills, (furmerly Pearl Mills DoLish Road	And the little of the Hall and Andrew 111 11 (howeverseles)	17,792	49 507	1,742	1,486	14 967	2,719
	Maken Mills, Itd. Mill No. 1 (formerly Mayore Spinning Manufacturing Co. 1 td. Mill N. 2)	1	23,978	22 800			1	1828
	Elphinstone Road, Part Modern Mills, It 1, Mill No 2 (formerit It me n): Print Mills), Malminarra	Mosers Source Co Ltd Agents, 70 Forles Street Fire Boules.	10 368	16,166	441	433	9,743	651
ı	Moon Mills Itd , New Sewice I mut	Noon teats Total to Ltt. Agents	34 428	,	670	-03	,	£ 001
1	Moraries Gorollas Semune and Message Co.	it Ceneral Assurance Budling Hornly Road Fort Bomba; Vesers Prannal Compaditor, Accuss Office	\$# hu2	الد 761	1,672	1 407	15 174	3,721
1	Ltd., Superising Road, Parel New China Mills, 111 (formerli (1m) Mill) Source	on Mill premises Mr. Nisurhan let Mafathal, Minnaing Parcetor 22, Charela etc. 84, Fact, Bombey	42 791	37,160	770	728	5,408	1 671
ŀ	New City of Homley Manufacturing Co., Ltd. Albert Road, Chinchpooply	Nowe W H Bruily & Co, 1 tit, Agents I avail Insurance Building, 1 14, Churchgale Street Fort Bombay	45911	44 157	432	4 76	6 423	1,430
•	New Creat Eastern Stumming and Westing (in- Ltd., Victoria Gardens Houd, Clinchpooply	Royal Insurance Bulling 12 14 Churchynic Street Fort, Boubay,	40,554	47,231	1,018	649	9,813	2 158
ľ	New Kauser : Hand Spinning & Wraving C > Lid Gorupdeo I und, Chinchpoogly	Lala had shipst ranghama, Mg Director J K Building Dougall Roud Ballard Friate Bombuy	53716	48,317	1,405	1,264	9 867	2 242
[New Pralisal Mills, 1 td (formerly Pralisal Mills) Ferguson Road, Lower Parel	Mours Amrit Banaspati Cu, Itd. Agenla, East & West Ruiling Apollo Street, Fort, Bombay	33 440	31,107	1,001	957	10911	1,957
ľ	New Sun Mills Co., Ltd. (formerly Madhao Rea Sendus Mill), Sun Mill Road Lover Parei	Larunashanker Panjaram, Mg Direc- tors 61/66, Cinchla Street, Rombay	17,244	15 066	319	•	1,504	509
À7.	New Union Milis, Ltd (formerly Union Mills) DeLasle Pond, Lower Purel	Movers Mafatlal Chandulal t Co -(Bombay) Ltil Mg Agents 127 Mahatma Gandin Road, Fort, Bombay	21 632	28 842	872	799	11 59.	1,634
48	Pi cenix Mills Ltd (former), Britannia Vills) Tulsi Pipe Line Road, Louier Parel	Mesers. Pamnaram Sone, Itd., Agents Imperial Bank Anneve, Bank Street, * Fort, Bankar	14 320	47,437	013	1:31	11,346	2 310
40	Tulsi Pipe Lure Read, Lonce Parel Pedar Mills, Ltd (formerly Tuva Pedar Citton Mills, Ltd), DeLisbe Read Prahash Cotton Mills Ltd (formerly Schearis	Agents Podar Chambers, Parsco Bazar Street, Fort Bombay	31 600	24 441	030	£5-	10 215	1,101
Ì	Cotton Mill No 2), DeLisle Road Rathuranda Uills, Ltd (formerly Kilachand	Chambers, 139, Medium Street, Fort, Bombay	37 160	31,701	376	351	12,643	1 120
	Stills Ltd.), 11-12, Harnes Road, Mahaluxmi Ruby Udla, 1 td. (formerly Sorab Mills) Woollen Mill Gelly, Ludy Jamabedp Road, Dadar	Agents Office on Mill premises. Messrs Choonilal Jeciandes & Co. Igents, 495; Apolls Street, Fort,	1 2,620	24 217	439	415	2.045	710
53		Bombey Meser M G Investment Corporation Ltd Agents 127, Valuating Gandin Road Fort Bombay	PQ 510	50 962	1,2-3	1,152	14,465	0 درځ
54	Seksaria Cotton Mills, Ltd., Mill Nos 1 & 1A, (formerly Currenthloy and Mohamedillios Mills) Tulsa Pipe Line Road, DeLisle Road	Mesons Street Fars, Bombay	72,796	€9 897	1 043	1 032	1- 616	2,904
น	Shree Areas Cotton Shill. Left (formerly Fazul bliog Mills, I til), Tulin Pipe Line Road, DeLi h Road	Messrs The Marsar Textiles (Agency) Ltd., Agents Shreemvas House, Wandly Road, Fort, Hombay	66 472	49 N42	3 010	1,563	10 217	2 6~1
	Shree Ram Mills, Itd (formerly Crescent Mills, 11d), Ferguson Road, Worls, I over Parel	Agents, Other on Mill premises	44 724	4, 118	9 20	931	4 140	1,843
67	Simplex Mills Co. Itt. Clerk Rossf, Jacob Circle, Byculla	Means Forbes Forbes Lampbell & Co., Ltd Agents Forbes Building Home Street, Fort, Bombay	- 20 251	31,049	1,1"7	1,211	10,508	2 276

COTTON MILLS IN AHMEDABAD

							(pprox)	
-	NUL OF MILES	AMPS OF GILTEN OR OWAYDS AND OPERLE TODRIFSSES	Te fal Yun iber of Sphill a Installed	At mg. unler of spindles at with daily	Vand r of Locaus trataled	twrage Validher of Locate at truk dully	mate quantity of Cotton ronsumed during the year in condits of 784 lbs	Average Number o Handa employed daily
13	Ahmedabad Shri Ramkredma Mills Co., Ltd. Gomtipur Road, Ahmedabad	Messes Chimanial Maneckiel & Co. Ltd. Igente Office on Mill premises	21 432	12,097	498	487	2 064	874
14	Apt Mills, Ltd., Bakhual Road, Ahmedabad	Mesers Chunukhan Naranbhas & Co., Ltd.	23 064	21 954	712	107	5 231	1,008
15	Ansuta Mills, Ltd., Rakhial Rosil, Abmedal sil	Agents, Office on Mill premis a Mexico Javantilal Amnatlal Ltd. Agents	21,892	21 708	4 (1)	445	5.267	960
16	Aruna Mills, Ltd., Naroda Road, Alumedabad	Post Box No 42, Ahmi dabad Moses P W Hathessing & Yons Ltd Igents Post Box No 57 Ahmedalad	40,729	40 432	8811	563	7 (0)7	1,592
17	Arrand Mills, Ltd., Naroda Road, Ahmedabad		17,676	36 1147	1,216	1,211	7,270	1,864
18	Aryodaya Ginning and Mfg Co., Itd Hormorly Alumedabad Vyapar Gotejack Spinning and Mfg Company, Limited), Awarus Rosal, Alume dabad	Office on Mill premises Wester Mangaldes & Bruther 1 til Agents, Office on Mill premises	12 gca	32174	*#4	867	7,004	1 563
20,	Arrodaya Spinning and Wenving Co., Ltd., Nu. 1, Asavra Road, Ahmedabad Aryodaya Spinning and Weaving Co., Ltd. No. 2 Asarva Road, Ahmedabad	Agents Mangaldas and Balabhur & Co Agents Post Box No 148 Ahmedahad	>2 744	albib	1 108	1 064	7,187	2 023
	Asarua Mills Ltd. (formerly Hitwardhak Cotton Mills Co., Ltd.), Asarua Road, Ahmedabad	Agents 12 Bell Laure N. M. Marlis	21 424	21 147	>5%	553	4 818	1,045
2.	Asoka Mills, Ltd., Naroda Road, Ahmedabad	Bildy Fort Bombay Mesors Lalbhar Dalpathbar & Co. Agents Post Boy Ap. 55 Abmodelad	16,254	31 (1 (6	1134	844	7,797	1.346
23	Berhanias Spinning and Weaving Vills Co. Ltd. Bakhid Rand, Almedabad	Post Roy No. 55 Ahmedelaad Mewan Durgaprasad S. Laskari & Co., Ltd., Akenta, Office on Mult premises	14,320	19 787	496	401	4,243	843
24	Abmedshad	Office on Mill proposes	16,461	14,309	8011	222	3 980	879
	Bharatkhand Textile Mfg Co., Ltd., No. 1, Camp Road, Ahmedabad Bharatkhand Textile Mfg Co., Ltd., No. 2, Camp		31 720	30 313	452	130	3 507	1,776
	Read, Ahmedaladi Bharat Survodaya Mills Co., Ltd. (formerly India Sup & Wyo. Co., Ltd.), Kankara Road, Itali	Mesora Mohatta Bros., Aconts. 2. Krishins. Society, Filia Bridge, Mimedahad	13 700	2.2 R6R	374	361	3,746	760
21	waypura Ahmedabad Bihari Mills, Lid , Near Klickes Mehmedaba I,	Meson Mondel Harilal & Co., Ltd., Agents	18 249	17 432	440	435	4,310	798
20	Ahmedahad City of Ahmedahad Spinning and Manufacturing	Post Box No 4 Alimedabed Measts Chamanial Mangaldas & Sons	22,940	20 962	702		4 191	597
30	Co , Limited, Kankaria Road, Ahmedabad Commercial Ahmedabad Mills Co , Ltd , Outsule	Agents, Office on Mill premises Wester Diunyibhas and Tricumbal & Co., Ltd. Agents Office on Mill premises	27,512	J8 6791	620	61 t	3,61	1,121
31	Prem Darwoja, Ahmedabad Fine Kultung Co., Ltd., Neur Chamunda Mata,	Messra H. Keshaviai & Co., Agenta, Rad	1,000	9 000			2,082	394
	Naroda Road, Ahmedahad Girdhardas Harivallabhdas Mills, Ltd. (formerly Rajnagar Mill No. 2), Outside Frem Durwaja	was pure. Ahmedahad Mesers Chamanial Mencadas & Cu., Agents, Office on Mill premises	21,805	21,402			2,339	p88
33	Ahmedahad Gujurat Cotton Mills Co., Ltd., Nacoda Road,	Mesors Chatterani & Sons Agents, Office on	31,848	29 398	601	n31	3,801	1,274
34	Almedabad Gujarat Ganing & Mig Co , Ltd , Outside Press	Mill premises Mesers Jampabhai Mansukhbhui Agents	23,232		644			
33,	Gate, Ahmedahad Guiarat Hosiery Factory, Rakhirl Boad,	Office in Mill promises Messes C C Delai & Co, Owners, Office	16 620	10,264			Í,187	271
			28,792	17 856	674	6,38	7 300	1 310
37	Cajarat brinning and Weaving Co., Ltd., Outside Kalingur Gate, Ahmedabad Harryaltahhdas Mult hand Mills Co., Ltd., Outside	Agenta, Office on Mill premises Means Girlharlal Hardul & Co., Agents,	17,712	17,323	443	4,39	4,072	760
	Unfurper Gate, Alimedaban	Venera Manufal Manufalm & Co.	23.316	11 637	,		1 664	333
	Suraspur Gate, Ahmedabad Himshhai Manufacturing Co., Ltd., Neur Suraspur	Agents, Post Box No 2, Ahmedabad Mesars Dhirajial Khushaldas & Bros,	17 560 ~	17,136	438	430	1 931	709
	Gate, Ahmedabad Jehangu Vakil Mills Co., Ltd., Outside Della Gate,	Agenta Office on Mill premises	32 661	31 166	761	690	6 101	1,349
	Ahmedabad Jitendra Mills, Ltd. (formerly Aubdia Mill),	Agents, Office on Mill premises Ver N. R. Jhaveri, Hon Liquidator,	3,8(0)				0 101	.,,,,
			17 200	12 100	313	377	3 438	62tl
1	Kuiyan Mus, Kin , Maroda Front, Francis III	Mr. Radhoshyam R. Morarka, Director in charge, 74, Marino Drive, Hombay Wesars Chimbhai Laibhai and Bros, Ltd.,	21936	29,432	781	772	4,578	1,573
	Lalbhai Tricumiai Mills, Ltd., Rakhlai Boa i Ahmedahaii Maheshwari Mills Ltd. (formerly thmesialsad	Agents, Office on Mill premises Mesers Dhimplel Khushaldas & Co Agents Post Box No. 79 Ahmedahad	21,032	21,015	178	501	2,141	897
45	Cotton and Waste Wig Co., Ltd.), Shahilong Road, Ahmedabad Maneckchowk and Ahmedabad Wig Co. Ltd.	Manage Manufal Spreamful & Song Agents.	31,128	31,129	832	8114	£ 631	1.274
46	Maneckchowk and Ahmedabad Wig Co Ltd., Nos I and 2, Radwaypura Post, Manerialasi Manecklad Handal Spinning and Mig Co, Ltd.,	Office on Mill premises Mesirs Hardal Harvalhabhdus & Co.	32,164	31,767	771	745	7,283	1,51ні
		Ltd., Agents, Office on Mill premises	12 244	21,963	481	476	6,730	1,163
	Caratania Alimalabad	Agents Office on Mill premiers.	23,816	23 816	529	522	7,198	1,212
		Agents, Office on Mill premises Never Poportial Chimanial & Co.	13,040	17 747	500	496	3 59 t	972
	Ahmedabail National Mills Co., Ltd., Comppur Baad, Ahmeda	Agents Post Box No 76, Abroedabad Mesers Chimenial and Govindial & Co. Ltd., Agents, Office on Will premises	19,712	t9 445	493	473	2,634	926
	bnd	Ltd., Agents, Office on Will premises						

COTTON MILLS IN AHMEDABAD

	NAME OF MILES	VAMES OF ACASTS OR OWNERS	Tital Sumber of Setudies Install L	Average Sumber of Spindles at work class,	Agmit er of Lessus towalled	rerace imber Louina at wirk Haily	quite quale quality of Lotton consum diduring the year ju can the of 741 the	Averag Number Hands employe daily
13	Ahmedabad Shri Ramkrishna Mills Co., Ltd., Gemtipur Read, Ahmedabad	Messix. Chimanial Maneckial & Co., Ltd., Agents, Office on Mill premises	27 472	22 0815	498	487	2 068	87
14.	Aps Mills, Ltd., Rakhod Road, Monedabad	Meers Chinishhat Naranbhat & Co., Ltd., Agents, Office on Mill promoce.	23,064	21 934	912	307	5 231	1 00
15	Ananta Mills, Ltd., Rakhual Rossl, Ahmedahad.,		21,942	21.708	150	41)	5,267	96
16	Aruna Mills, Ltd , Nareda Road, Ahmedabed .	Post Box So 42, Ahmedsball Besse P. M. Huthresing & Sons Itil, Agents Post Box No 57, Ahmedslad	10,7.29	40 432	850	56 t	7 005	1 59
17,	Arvind Mills, Ltd., Naroda Road, Ahmedabad	Moses. Narottam Labhai & Co., Agents,	79 ST	30,947	1,216	1 212	7,210	1,86
18	Aryodaya Ginning and Mfg Co., Ltd. (Iormerly Ahmedabad Nyapar Dotejack Spinning and Mfg Company, Limited), Asarva Itoad, Ahme- itabad	Agents, Office on Mill premises	31 M A	32 (11	841	, 861	7,004	56
19 20	Arvolaya Spinning and Weeving Co., Ltd., No. 1, Asayra Road, Ahmedabad Arvolaya Spinning and Weeving Co., Ltd., No. 2 Asarva Road, Ahmedabad	Messa Mangallas and Bulablas & Co Vents Post Box No 146 Manedala	s. 11744 d	51,656	1 108	1,064	7,185	2 (12
	Asarka Mills Ltd (formerly Ritwardhak Cutton Mills Co., Ltd.), Asarka Road, Ahmedabad	Agents, 12, Bell Lane, N. W. Wadis,	27 424	J1 597	34 16	a' l	4 818	1 60
21.	Asoka Mills, Ltd., Narods Road, Akmedahad	Nesera Lall has Dalputhhas & Po., Agents Port Box No. 55, Abmedalusi	30,244	37.656	934	846	7,797	1 34
23	Becharles Spinning and Weaving Wills Co. Ltd., Rakhird Raod, Ahmedabad	Acents, Office on Mill promotes	1, 19,370	15 757	496	461	4 247	81
21	Bhelakia Mills Co., Ltd., Kankarus Russi, Ahmedahad Bharatkhand Textile Mig Co., Ltd., No. 1, Camp	Office on Mill premiers	10'101	14,349	HINK	122	3,980	87
26	Road Ahmelabad Bharatkhand Trivib Mig Co. Ltd., No 2, Camp Boad Ahmelabad	Agents, Pest Box No 30, Vimedalad	1, 31 720	311 717	¥27	N31)	1 107	1,37
27	Ilharat burrotaya Milis Co., Ltd. (formerly India bpg & Weg Co., Ltd.), Kankeria Rossi, Itail wavpura, Ahmedahad	Messre Mohatta Bres., Agents, 2 Acrelina Society, Filis Heidge, Alimedabad	13,7141	12 869	3-1	364	3 746	76
24	Bilter Mills, Ltd., Noar Khokes Mehmedabad, Ahmedabad	Boses Bottlel Hardal & Co. 1 td., Igents, Post Box No. 4, Abunsialud	18,210	17 412	440	436	4,310	791
29	City of Ahmodab at Spinning and Manufacturing Co. Limited, Kankana Boad, Alimedahad	Mesers Chamanial Mangaldas & Sons, Agents, Office on Mill premises	15 810	\$1) (16.1	302		4 191	597
30	Commercial Ahmedahad Mills Co., Ltd., Outsele Prem Darasia, Ahmedahad	Mosers Distribution and Troumfel & Co. Ltd., Aprele, Differ on Mill prepriets	27 5 2	20 41)	r 20	615	1011	1 12
31.	Fine Engling Co., Ltd., Near Clauminola Mata, Naroda Road, Ahmedalust	waynga, Alimedahal	19 (919)	a mpi			2,6×1	394
32	Girdhardas Harradiabhdas Mills, Ltd. (formeris Rajnagar Mill No. 2), Outeste Prem Darwaja, Ahmestabed	Agenta, Office on Will premise a	21,545	21 402			1,330	188
33	Gujarat Cotton Mills Co., Ltd., Naroda Road. Almodabed	Mesors Chaturani & Sons, Agonda Office in Mill premises	31,444	24 34×	6841}	(3)	3,900	1 274
34	Supress Sunning & May Co., Ltd., Outside Press Sate, Ahmedatad	Moses Jamoshka Massakhka, krass, Office in Mill premises	3273		611			
	Qujarat Howey Factory, Rakhial Road, Almedabad	Mesers, C. C. Dalol & Co., Owners Other on Mill premises	16 626	10,264			1 187	271
36.	Gujaret Spinning and Weaving Co., Ltd. Out 4 1- Kalupur Gate, Alimedshail	Acents, Office on Mill premies	18 407	27 8 hp	674	428	7 JUNE	1 110
37	Harivaliablidas Mulchand Mills Co., Ltd., Osto Is Darapur Gate, Alimedabad Hathising Manufacturing to, Ltd., Ostods	Mesere Christiachel Harrist & Co., Agents.	17712	17,327	414	131	4,072	760
39	Samerur Gate, Ahmedalud	Agents, Post Box No. 2, Alumedition	11370	11 6 .7			1 664	333
31	Himshbus Manufacturing (o , Ltd , Year banapur Gate, Ahmedaland	Mesors. Dhirulal Khushaldas & Bros- Agents, Office on Mill premises Mesors Rustomics Mangalilas & Co. Ltd.,	₹T Stott ◆	17 13a	434	1311	1 931	709
40	Jehangur Vaksi Mills Co., Ltd., Ostsule Dellu Gate, Ahmedabad		12 684	31 166	-41	#9I)	R 107	1,348
41.	Jitendra Mills, Lid (formerls Astedia Mill), Outside Astodia Gate, Mimedialia	Mr N K Jhayers Hon Liquidator, 2972, Ratsupole, Ahmeelabad Mr Hadheshyam R Morarka, Director	3 (00		3711			
42	Kalyan Mills, Ltd., Naroda Road, Minedahad	in charge, 14, Marine Drive, Bomo iv	13 260 29 936	12,4100	784	377	3 435	620
13	Lallihar Traumlal Mills Ltd Bakhul Boad, Ahmedabad	Agents Office on Mill premises	11 071	21,015	125	772	3 37N	1 573
41	Maleshaan Mills Ltil (formerly Mimedabad Cutton and Waste Mig Co., 1 td.), Shahibag Road, Ahmedabad	Messys. Diurajial Khushaldas & Co Agents, Post Box No. 79, Ahmedabad				101	2 141	497
45		Mesers Hir dal Tricumial & Sons, Agents, Office on Mdl premises	31 128	31 124	N t2	694	6 631	1,274
46	Meneckhi Harilal Spinning and Mig Co. Ltd., baraspur, Ahmedabad	Office on Mill premises Wester Hardal Harryalhablidas & Co. Ltd. Agents Office on Mill premises Mestra Marisdon Brox & Co. Ltd.	32,164	31 787	312	745	7,293	1,500
47			22,214	21 961	182	116	6,735	1,163
48	Monogram Mills Co , Ltd , Rakhial, Ahmedatuni	Mesers Manulal, Marsden & Co., 1ed Agents, Office on Mill premises Missrs Poputhal Chimondal & Co., Agents, Post Box No. 36, Ahmedabad	23,826 19,040	23 876	200	922	7,195	1,212
49		Mosers Populial Chamenial & Co.	1.4040	11.441	Q-40	436	5,591	972

COTTON MILLS IN AHMEDABAD

-	NAMES OF MILLS	ATHE OR POLICE OF OFFICE AND OLD PROPERTY OF PROPERTY OF OR OFFICE OF OTHER PROPERTY OTHER PROPERTY OF OTHER PROPERTY OF OTHER PROPERTY OTHER	Total mer of punities tosis ed	terrage vamber of pindies at wo k dails	Vun ber V Looms a ed	Average Number of Looms a wink daily	A proxi-	Av race V mbe of H n.is empt y d daily
 51	New C to to real Mills Co Lt I Naroda Road	Mesors Tra mini il ognisi & Co 111	365 (3.41	9*	41	J 558	1 431
5.0	Alm labed New Manak howk Apinoing and Wessing C Lat O al Dirap r Gate Ralma p ra	Mesers Lall ha Translal Agen a Off on Mill premoes	90	* 8 1	658	601	4 16	1 -2
53	Almedabal New National VI of Ital Raki ni Road, Ni neelis	Weers Tr umlad Blogald Son & Co	19 65	18 59	450	418	4.1	7
64	tal New Rajj r Mit Co Itl (frmerl Bapr	Nevers Bl khalla J alta & Co I I	19 79*	1893	3 0	303		693
	Mil (1) Comparitiond Misselabed New wall Miss of threedeland Itl If r shy the count would Street age 1.	Agents Otton at Milipren sea Mars The Cutton Agenta Ltd Mg Agents Impe i Hink Hilg	31 0	8 004	75	30	3	1 540
56	Mf (o Itd] Aresla Road Almedat al Nu an M Ha Ltt Out 1 N kel Cat Sura pr	Bakkmat Fort Bond 3	0 840	4) 98	006	. 1		915
•	I al Mrs lalad I al Mito Iti (formally Compression na Wantal Man fact rig (o. Im. ed.	Ltd Agen a Office o Mill pren need Mesers Di sight Ci n lol & C. Agents Office on Millprin need	1384	13 143	356	3 1		336
5-3	Ray I Man for my Co It! G took harm	Venera Labbia Dalpathha & Co. Le.	9.09	5 1	C3	630		t o
.9	Ra a ar St nine Was & Mily Co Itl S 1	Part Box to at threelabed Them thing dias Critica land stell Let	1 * 1	1 133	6 4	4,3	l	750
r	Is very r Lost C ny Hoad Minel bad Lapanger ny max Wig & Mig Co Ltd No	Ag n No 40 Ahmedalad N rs. Na gallas Crihanias Prekl I ti Ngo No 4 Almel I at	*9 5%	*) 441	618	9	ſ	l u
ſI	In least rall w taup Russ Murch 1 11 1 M L 1 C M Jupur Al medala 1	News Lall ti Corlia les Itd	-T M	a ₃ ()	648	4		1 404
6*	J≻li G e Nimedahal	Umr label Umr I and lat Stan lat & Co Agents Offices on M it prim ses		19 [0]	404	39		5
(3 81	Sarana par C ton Man fa t tung C I f No I (a l Ba pur Cate Ahmedal ad r nup r Cotto Man fa r nup C I l No Ne r J and I Mala I M nel w J	Meson 5 karl i Balabi & Co I t i Age to Off e on Vall premises Meson 5 ak w i I Bal I i & C I I Ag a Off w on M il premises		4 1	139	1 381		3 0
•	Same T M I I I (forms I hark F T Ma u fa na Co Itll Nest Samut Ga Sh sedahad	N wes Lallda Dalutila Sons & (o) \ge t Office on \li li pre \ \epsilon	1 1 1	37 184	850	6 3		1.443
f	harrisch jung and Mar fact eng Co 111	M wers Maf 11 (land lal & Co [M nedabad) I l Meets Oftwo	31 64	3º 1	7*0	to	4	131
t	blime than I (tto Mill E frimers tin but New Sari rd M is to Lti) Na	Militer uses Messes Ann Iram Ratenial I t 1 Age 1 3 Kalbs dur Pond Ron ba	19 40	17 4 C	406	394	4	643
	Sara i rt e M sellous Shri Ani a Mi III N I Ia kara Loes Sul a Ialwayp rs W nestasa i S ri Ambua Mi III N s (fronti) Cla sir Ilant W I III) N s (sel Luke Ahm sta	Were Her allabilities Lake Congents for Box No 11° Alemed had Mesers Harn allabil Kalika & Congress for allabilities and Local Age Chart Rox No II. At one Con		53149	1 333	1 6		4 600
~ 0	hal Un star MI Lil Screep r Roal Hale pared by Minodaled	Mers Modjer In La t Co ternt Modjer I ti B ig I reces Stree	J ,,,,,	1 1 19	486	451	3 058	6
71	"Ir I rkans 1M I I flats pro Rakl at	Ments be blo Manchill to Iti		18 61	404	400	°,88	756
	The train Mi to Iti hankara Loro		91 188	10 133	506	700	41.5	1 031
-3	Vas Mila (o Iti Naroda Houl Umed bal	Mars Har has A bru LIA Sun Age t	4 410	-7 03ts	640	649	4.3	1 107
-1	V krain MI Ltl Ot I & and r Ct Jilwa jim Vimedala I	On won Miljerm wa Means La anial Lal II 111 Agent On win Miljerm ser	3 541	31 *44	800	ř14	4 640	I 434
		Total	15 1716	17 64 1	4 403	39 610	3 19	75 1

OTHER COTTON MILLS IN BOMBAY STATE

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	NAMES OF MISS	AND OFFICE TROBENTS AND OFFICE TROPENTS	Total Tun bered Spindiss Installed	Average work for al work daily	Youther of Looms It stated	Average Van ber of Looms at werk daily	inate quantily rf (otton consumed during the year in candi 5 of 154 fbs	Average Aumber e Flands employed daily
1	Abdal Samad Hap Lal Mulanumad Weaving Factors, Bhiwandi (Thans District)	'Aban Shieh Abdul bamad Hap Lal Muhammad Owner, Office on Mill premises			246	173		.165
2	Anjar Spinning and Weaving Mills Co., I tol. (formerly Lutch Spinning and Weaving Co., Ltd.), Anjar (hutch)	P V Shale Len Chairman Officeron Will	1 736	2 125			1 046	202
3	Baroda Spinning and Weaving Co Ltd Pan Gate, near Bhadra, Baroda Barai Spinning and Weaving Midb Itd	Mesors Javerchand Luximi hand & C. Agenta, Office on Mill premises	30 376	311,02	644	644	o 317	1,260
4	Barsa Spanning and Weaving Mids I to Barsa Town (District Sholarur)	Mesers. Desar Sons & Co. Menaging Agents Office on VI II 1 remises	10 9ini	# ผูกส	276	289	3,011	987
5	Bharat Spg and Wag Co, Ltd No I (formerly Hubb Mills, Ltd.), Hubb	Vessrs Pursbotam Coverdage and Co Vanegus, Agents Good Mansson Homes Street Fort, Rombas	2 7011	27131	1611-4	604	5 1 (4	1 227
	Bharat Spg and Wvg Co, Ltd., No 2 (formerly Hubbi Mills, Ltd.) Hubb	Managing Agents, Gool Mansion II maji	જ જાવ	J				
7	Bharat Vijava Mills Ltd (formerly Kelol Lepedia Spg & Wvg Mills Co Ltd.) Kelol (North Gujarat)	Messer Romanial Champakid & Co tecuts, Office on Mili premius	12 t***	1230	320	109	7 441	603
8	Broach Fine Counts Spinning and Weaving (o Ltd. (formerly Broach Inclustrial Cotton Spinning and Weaving (a. 1 td.) Mahamid	Messre Brilal Bilaera A. Co Agents Agakhan Inul ling Dulal Street Fort Bombay	14 H14	23 502	741	431	935	809
4	pura Road Near Station, Broach Challegaon Shri I axini Narayan Mills Co Lin (formerly Shri Laxini Narayan Mills of the New Cunning Pressing & Mig Co, Lid) Cholishoon	Messra Amoyan Hankit Apint, Office on Mill premises	22 t 3le	12 2 6	t 04	41	1 48]	1 208
10	Past Chanlesh Chhotelel Mills Ltd (formerly Lafet Cetton Mills	Mesers Chotal il Huaclant L. C. C. Agents	180 66	18 0 (6	4 16	4(4	3 261	709
11	Co , Limited) Kalol (North Gujarat) Gackwar Mills, Ltd , Billimora	Office on Mill premues Mesers, Jl. M. Melita & Cu., I til., Agents	21276	27 427	6'11	631	3 3,11	1 173
19	Gendalal Mills Ltd (formerly Bhagirath Spinning & Manufacturing Co. Ltd.) Julgaon, Last	Managenz Director Office on Mill	1 - 504	12 20 1	108	341	2,971	89 >
13.	Khundesh Khundesh Lid (formerly Gokik Water Power & Mfg Co Lid), Gokak Falls Belgium District, 9 M C	Jesus Forbes Forbes Cumpbell & Co Jid, Again Forbes Builting Home	73 1%	68 739	2	1	15 tit I	2703
14	Gopal Mills Co. Ltd. (formerly Whittle big & Mig Co. Ltd.) Mill No 1, Walintma Candla Road Broach	Strait Fort Bondon Mesers Naturilas Harden & Co Agenta Co The Vijava Mille Co Itel Naro is Road, Urmedaba I Resus Narodon Ibandon & Co Agenta						
18	Goral Mills Co., Ltd. (forms it) Whitth. Spg. & Mig. Co., Ltd.) Mill. No. 2 Mainting Can the Road Broads. (forms it) White Sep. 4.	Con The Vijiya Bliffs Co., List Narola Road, Almedalad Blesses Annd fas Handus & Co. Agusta	21 744	_1 1 1 8	(2	520	1 450	1 239
	Gopal Mils Co., Itd. (formerly Whitle Sep & Mig Co., Ltd.) Milt No 3 Vahatma Gandli Road Breach	Co The Vijaya Vills Co Ltd \arods	20 426	30 314		495	C 202	1 587
17	Jam Shu Renjismshji Spinning and Weaving Mills, Co., Ltd. Sholapur Jayashankar Mills, Barsi, Ltd., Burn Town	Bank Street Fort, Bombay		11 5 /9	511	493	3.414	743
18	Kanti Cotton Mills Ltd (formerly Wadhwan Camp	Mill premises Means Chandilal Relial & Co. Mg.	11 840	1 1 1063	3 '6	308	2740	652
10	Milis), burendransgr, Wadhwan Camp (Saura	Agents Office on Bull premises						
20	Keelan Male Co Ltd Pettad Khandesh Spinning and Was Mills Co 1td.,	Messrs Chandulal Keshaviol & Co., Agents, Office on Mill premises	10,391	1 +,336	₹Li €	157	4 745	633
21	Jaignon Eist Klantslesh	mg 42 Queen s Road, Back Ray	13 0 16	21 490	46,	437	7.413	1 106
22	Krehns Kumer Mills Co Lict, Meliuva (Saurashtra)	Messrs barendranath Maganlel & Co, Agents Office on Mill premises	8 146	4 _04			1818	351
23.	(Saurasatra) Lakshmi Cotton Manufacturing Co., Ltd., Sholapur	Mesers The Bombay Co. Ltd. Secretaries Trensurers and Agents, 7 Wallace Street Port Bombay	45.252	42 103	1 213	1,210	111973	3 278
24	Lokamanya Mills Barst I td , Burst Town	Mesers Sulakho & Co., Managing Agents Office on Mill premises	9,534	8 78 1			2187	540
25	Madhaynagar Cotton Mills Ltd., P.O.	Mesors Budheaen Train, Co. Itl	904	o 1193	80		64 (239
26	Mafatial Fine Spg and Manufecturing Co 1td, Vejalpur Road, Aussari	Mg Agents, Office on Mill premises Messry Mavinchandra Purchotandas & Co. Lid Agents Office on Mill pre- mises	2* 620	2.610	846	818	2 777	t 360
27.	Mahalaxni Mills Ltd Near Chawds Gute	Messes Hargovandas Juniclas & Sens, Ltd. Agents, Office on Mill premises	18 93	16 842	4116	321	o 955	1,186
	Bisvasgur Maharona Mills, Ltd., Perisandar (Kathiswar)	Shree Nanjibles Lakdas Mehta MBF, Owner, Swanish Bhuwan Ugawda Pond Porbandar	23 376	22 704	546	341	3 (3)	1,170
	Mirathe Textile Mills Near Railway Station, Miraj (SMC)	Messrs B K Maruthe & Sons, Pariners,	2,794	1,933			260	148
30	Narayandas Chucial Cotton Spg and Wvg Mile,	Mesers Narayandas Chundal, 312, Aalba deel Road, Bombay No. 2	12 824	10,791	214	167	1,441	604
31.	Mills), Gudag, Dharwar (West) Narsunggars Manufacturing Co Ltd., Station Road, Sholupur	Diantajgir Raja Marsinggirji, Agent, Office on Mill premises.	58 003	4,485	1,170	1,156	9 621	3 110

OTHER COTTON MILLS IN BOMBAY STATE

1	NAMES OF MILI	NAME OF ACTIVITY OR OWNERS AND OFFI E ATTIF F	T at Number of p ad es justs led.	Amerage Trabe of Spindes at work	Yamber of Looms insta rd	trerago tumber of Looms a wo k	m, e qu nui y of to ton consum d durin the year candws of 4 tos.	Average Votober of Hands emp yel dail
3*	Name and Mills Lill (orm at halol Swells)	Mesers R tompe Magallas & Co	* 39*	00 414	10	303	₹ 101	1 049
33	Navy wan Mills Lt i (orm ri Kalol Swel al Mills Co Lt i Kalol Norti G jarat Na sari Cotton at d S lk Mill 14d (farr 11ly New	Ves rs H M Mehta t Sons Lt I Agents	1850	1793	43	43	950	813
31	Darbanga Mill) 's ar 'sew Clio alal M i Lti (formerly blad I ave	Vices (Motelal Heache d A. Son	19 0.6	110 0	404	3 0	3 174	799
	Cotton M1s Co Ltd.) I hadi New Inda Ind res Ltd Jetaly r Ros I	Age to II rabag Ell a Br dge U medal ad Vicasto D a r bu ora (Baroda) Lt l Agents	7 660	480			11	3 0
30	Baroda New Jebangar Vak l Mills Co I t I (form ri Ven	Pace Course Road Barods Ves. 12 Rustom Mangellas & Co Agent	31 940	31 475	ts	6.5	44	151
	slunker Lux a slunker Cot o Mills Ca. Itd.)	Bla moor Messre Mot lel Mane L land & Sus	45 136	44 3 3	108	101	в 3	194
37	New Prat p Spg Wa ng and Mf (o Itl Dhola W Klas de-l	tre a Office or Mill premises		44 46	564	ha9		1 531
38.	New Shorrock Spannin, and Manufa turing Co. Lt.) (Frmerly Nadad Swateshi Spanning Weaving and Ma. fat ring Co. 111) Nalad Dit Johns	Mears Mafatlel Clan bill L Co Ltd., ver to Treas ters and Agents., As r. Boal Ralwaypu Post thmedabal	. 40 13	44 40	504			
39	A ranged Mills Ltd (f rm 1 The arem Mill)	Mesars Shapoor, & Co Agent Office on	8 944	3 5	3	78	13	450
49	Falsawa li S rat Petlad Bulski das Mill. Co 11d Year S at o	Valid premiers Ves.re Vot lai I a landas & Co Sees Tetasurers & Agents S at on Rd Petiod	18 ° C	19 111				594
41	I and Petlad (I a 4nan i) Prable Mills (form ri V ramgum Mill I tel)	Measts Janal Ltd Owners 59 Forbes	3 698	21 4 1	5 %	3	4	110
49	Fulwadi Road 1 rames n Pratap ap Wag and Mig C Ltd 1 4 *; Amainer Last khand b	Measts Mottled Mancekel and & Co	48.9	4 454	1 08	1 048	a	° 614
43	Pogna Cotton and Sik Manufact ring Co. Lt 1)	Agents Office on M II premises Mes.rs Raja Mukundial Bans lai & Sona, Age ta, Hamam Ho se Hamam St	16 908	15 94%	*	1	4 603	947
44	A kennedy Ros i Poons Raja Ragi unathrao VIII. Bhor	Fort Bombay Mesers Mahares) tra Text les Ltd.	930		41			80
45	Rajkot Spg & W g WR Ltd Karansinghy	Owners Office on Mill premises Mea re Shapoori Palloni & Co Lid	10 87	10.0	03	191		110
48	Rajkot Spg t W g W ll. Lul Karansungh; Cross Road Karanpura Rajkot Kathunwar) Rajratna Naranbl a Mills Co Ltul Pe lad	Agen Other or Vall premises Messers Ramental Aesha tal & Co. Age 49	18 360	18 60	3 8	18	0	8a0
47	Santokba Spinning & Westing Factor	Office on Vall pre n ses Mesers Governilal Gandulal G and gars	3 "					
48	Nar Road Bis mager Secuniter Sar Mills Sow lagar Molalis Bi wand	Wated O ad rSecunder Patel Lea Owner			103	Đ		18
49	(Thana Date t) Sholapur Spanning at d We ng Co I to S at on	Office o Mill premise Measts Morarka & Co Agen Stan land	96 د10	93 965	34	4 058	1 34	196
50		Bulding Fort Bombay Jamararan Shmath Ladda Esq	140	0	04	8		^ 0
51	Sirve Balaj Sp ning Wea in & Ol Mills, Fxens on Part foingl Shree Dgy ; saingh; Sng & W. & Mills		13 04	106 \$	100	9	4 %	581
50	Shree Dgy; asingh; Spg & W. g. Wills Berloshwar Bunder Road Jamu gar Slree Har Cutton Will I I (formerly S. Illan)	Ltd Agents Office on M II premises. Mesers Jalen Bros Proprietors Office on	3.0					
53	Mls) Year Raiw Ya on, Sidil pr (NG) Shree Harlad Textile Mil Januagae	Vall prem se Venera P V Shah D K Shah & C V Maroo Pariners Office on Mill premises			4			16
51	Shri Ramedi Cot on Mil Ltd (forme h Mor	Maroo Pariners Office on Mill premises Mesura Tre Mora Ind s.r. a Ltd. Agenta	11 985	10 89	3 4	98	64	0
6.	Co ton Milis Ltd) Nors (Kathiawar) Shree Saya; Jul lee C tton & Jule Milis Co Ltd.	Office on Mills premises Mesers Prelhad Sevakram & Co Apre ts	14 419	13 610	3	310	34	
	Shri Kameda Cot on Mil Lid. (forme b) More Co ton Mills Lid.) More (Kathasawa). Shri Kathasawa). Shri Kathasawa (Shri Kathasawa). Shri Kathasawa (Shri Kathasawa). Shri Kathasawa (Shri Mills Lid. (Shri Meri Cartha). Shri Kathasawa (Lid. (Mills Lid.). Shri Kathasawa (Mills Lid.	Oppos to Sta on, S dhp r The Text lo Agents Ltd Agents Office on	1 936	1 39	336	13	1 694	ng
	Cambaj State Vills) Huse n Yawar Road Camia (Dis Kaura)	Mill prem ses						
o'	Shree Asmuna Mills to Lt I (forme ly Ne Baroda M lls Co Ltd.) Coya Gate B roda	Mesors Za ereland Laxm 1 and Bros & Co Agents Office on 21 II premises	ت	901	6 4	D 9	1	1 133
٠.	(hat) awar) I II	Agents Office on Vall prem sea	1 6 1	1	3 0	314	3 400	18
5	hri Gajanan M la Sudamapur, Sangi S.M C.	Mr 1 R Velankar Proprietor Office on			13	6		159
6	Co Ltd) Padra Road Barola	3 leasts, Jagel 1 (Agency) Ltd. Office on 31 h prem ses	, 5 0	10 141	104	394	3 036	938
6	Sin Lax m Text le Mills Ltd Bi or	Messry Bhor Mercantile Agency Itd	4 048	3 204			614	16
6	,	premises.			9	J.b		110
4	Buroda	Vicegra Vad Isl Lathur ha & Co Office or Vail premises	80	2 241	6.0	488	5 483	1 100
6	8 21 C	Years James Finlay & Co Ltd. Agents		15 53	319	318	4 1*	671
6	Sidl pur M'lls Co Ltd S dl pur	Veners Maganial Parbhudas & Co Agents		19 116			5 08	584
- 6	Named and a set	Mr Navmchandra Mafatlal Mg Director	21,33*	*1 * 4	33	344	* 35	858
6	District Office and Ltd Thekarwad Stofapu	r Mesers, \s kand Company Agents Office on Mill press ses	D		ε	10		133
•	S Venkatesh Rang Tentu M 1 1 halksranji S N C Opp Ru Sta on Vandol	Datar & M. V. Datar D. V. Datar & M. V. Datar Dwners Office or Mill pressures.			75	*I		56
	3 Venus Textile Mills, Ltd. Degham		21.	. 67			438	97
	O Aschno Cotton Mill 1td Sholapur	Office on Mill premises. Mesers, The Bombay Co. 14d. Secretaries Treasurers and Agents 9 Wallace Street Fort Bomba	44 600	4° 467	1 433	1 45	11 707	3 *30
		Total	13 03 038	1* "0 454	26 680	95 0 0	9 40 300	66 8-0

2 'm J J J J J J J J J J J J J J J J J J	RAPUTANA, ARAT Milis Co., I tid., Brayer MES Spr. & Way Milis Ltd., Near Ponce House Mayor Spr. & Way Milis Ltd., Near Ponce House Mayor Milis Ltd., Near Re. Station Beaner Albeston Milis Ltd., Near Re. Station Beaner And Milis Ltd., Near Re. Station Beaner And Milis Ltd., Milis Ltd. Milis Ltd. Maingrap Ling Milis Ltd., Milis Ltd. Milis Milis Milis Umoud Milis Ltd. Milis Ana Depart Catton Milis Ltd. (formood, lipsy Ling Could Milis Co.) Near Milis Ltd., Biddwara Milis Milis Ltd., Biddwara	Mb. Agents Maling mj Keb i cirl Meser Ho birec kirdin i Agen i Hi- Agents Oftic on Mill premises Mesers Si hagmoal Sunju trind Ladiq Uniquig Agits Oftic on Mill pre- prises Selli Raghunathonic Universitation Mg. Director Oftics in Mill premises Selli Sagnourmal Universitation of Selling and Mill Selli Sagnourmal Universitation Mg.	20 488 10 16 7 20 13 728 26 6 60 17 136 7 812	(m 51), 4 15), 5 7000 17 507 13 23 6 23 600 17 130 7 534	37(310) 676 616 571 424 250	596 - 115 581 403 336 425	5 4*1 1,1 5 051 7,210 3 610	11 55 20. 413 1,3 (1
2 'm J J J J J J J J J J J J J J J J J J	our Spc. & Wyg Mill's Ltd., Near Paster Ho as- ber Text of Ltd., Blumgung, Kotalis In Jun Mills, Ltd., Near Rv. Station Beamer of Jobbian Mills Co., Ltd. Beamer or July Kallengerh. Mills. Ltd. Ma Ingrup, and engigh. The Uman Mills. Ltd. Palt Mariner revor Textule VIII. Ltd., Bildware. The Direc Cotton. Mills. Ltd. (formerly. Bigan on Bird. Cotton. Mills. Ltd. (formerly. Bigan we Direc Cotton. Mills. Ltd. (formerly. Bigan we beamed and Mills. Ltd. (formerly. Bigan we beamed and Mills.).	Mi. Davet of Discas Novel Bennar Messes where Lavan Trees 11(We beare dollar Bone, Impar 11) Mi. Santo Office at Mill premises where the Mills and the Mills and the Control of the Mills and the Novel Art Law Trees and the Mills and Mil	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	4 15 + 17 m 17 7 m 17 7 m 17 7 m 13 27 1 23 1000 17 130 17 130 17 134	\$10 676 416 531 428	115 581 403 336	1,1 3 (75) 7,210 3.510	201 413 1,3 (1 825
1	Hope to Trail + Ltd., Blumgun, Kolah In tun Vills, Ltd., Neur Jis. Viatasa Damar adakshin Vills Co., Ltd. Bamar adakshin Vills Co., Ltd. Bamar and Salah Ltd. Pali Viatasa in 1945. Kalesagach. Mills Ltd. Pali Viatasa in 1945. Ser Umma Mills Ltd., Bildvara von Tectak Vills Ltd., Bildvara von Tectak Vills Ltd. (Gerneck. Bijav. 1946.).	Meess Shree Laxun Tr leve 114 We become Solver Bone, 1994 We become Solver Bone, 1994 Me Lante Office at Mill premises Mees Theorem Solver Bone, 1994 Mees Theorem Solver Bone Meess Theorem Trees was to be seen turned Trees are to the Mill premises Meess Solver Bone Meess Meess Theorem Theorem Solver Meess Mees	7 30 18 58 13 725 26 630 17 136 7 812	17 100 17 107 13 23 1 23 100 17 130 7 134	676 416 501 428	115 581 403 336	(15) 7,210 3.510	413 1,3 (1 825
3 K M 3 K T 5 * fold 1 3C * fold 7 Mad 8 Mo 9 Sym 1 11 10 Shm 1, Ber 2 R 1 3 Sym 4 V 1 4 V 1	h Treat Ltd., Blumgung, Kolah In Jun Mills, Ltd., Neur Rv. Status Drawner at Johnston Holland Co., Ltd. Brawner at Johnston Mills Ltd. Ma Ingrup and engaged. Mills Ltd. Palt Manner revolution with the Mills Ltd., Elidoure Service Wills Ltd., Elidoure Service Wills Ltd., Elidoure Service Wills. Ltd., Elidoure Service William Ltd., Elizoure Revolution Mills Ltd., Elidoure Service William Ltd., Elizoure Revolution Mills Ltd., Elidoure Service William Ltd., Elizoure Revolution Mills	Mesor's Squarmal Syr, & Way, Mills 1(1) La hards Offer on Mill premises Wester Ti idural vi him rang & to Soort Resear Ti idural vi him rang & to Soort Resear South Individual Vi Investor Ile twat Moore South Individual Vi Investor Ile twat Moore Tel Shore kandara Kapan Sirila Moore Tel Shore kandara Kapan Sirila Moore Tel Shore kandara Kapan Sirila Moore Shore Kandara Kapan Sirila Moore Shore Shore Shore Shore Shore Magamal Sumptoned Lading Magamal Sumptoned Lading Magamal Sumptoned Lading Magamal Sumptoned Lading Magamal Sumptoned Mill premises Sirila Sandaramal Municipalika Magamal Sumptoned Lading	18 718 13 725 26 8 at 17 138 7 812	7 134 23 900 17 130 17 57	676 416 501 428	541 403 336	7,210 3.510	1,3 i1 825
5 '() 1 Mai h 7 Mai h 8 Mo 8 No 1 I 10 Shr 1, Ber 2 R 3 Shr 4 V 4 V	ul deshmit Mils Co., Ltd. Bannar nariyla Kulhengarli. Mils. Ltd. Ma Li gang- la engarh. nariyla Gar Umuu Mills. Ltd. Pult Marinar new Textula VIIIs. Ltd., Eliduaris. new Textula VIIIs. Ltd. (flormed). Uljaw new Contol Mills. Ltd. (flormed). Uljaw new Contol Mills. Ltd. (flormed). Visita uswaran (Alman).	taris Trosures in Ugnis Bestuar Le til Lalin Robins IV. Director Mostri Sun Internal Van ee H. Director Mostri Sun Internal Van ee H. Mostri Office on Mil premiese Vanto Office on Mil premiese Mostri Office on Mil premiese Mil Robinsthom. Umenglade Mil Director Office in Mil premiese Sth. Sanoarmel Municiplika Me	13 725 26 8 40 17 138 7 812	13 23 (23 file) 25 130 7 534	416 531 428	403 336	3 510	H25
1 Mai h 7 Mai 8 Mo 9 San 1 H 1 H 1 H 1 H 1 H 1 H 1 H 1 H 1 H 1	irijah Kuhengarh Mille Lid Madagan, as mugah terjah Sr Umand Mille Lid Pali Marnar terjah Sr Umand Mille Lid Pali Marnar terjah Sr Umand Mille Lid Jahdaara Palipas Cotton Mille Lid (formeris, Bijas seni Cotti Mille Co) Sear Hy Sittim umanan (Januarana	R. S. with Led Iron Lockbar M. Dive, or the control of the control	26 8 40 17 138 7 812	23 Pare 47 130 7	371 424	336		
1 Mat 8 Mo 8 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	13 mgrith triad Mills I tid Pult Marust twur Textids Mills I tid , Rhdwars 18 Dijay Cotton Mills I tid (former), Hijay xxini (Totti Mills Co.) Near My Stittin (hydwars), Waxini (Totti Mills Co.) Near My Stittin (hydwars), Kilmer)	Mesers Son In Jerral Agenes 14 Mesers Majuran Nebo 1, and Meser He Shree Kristlin Agent 144 Meser Sid Shree Kristlin Agent 144 Mesers Sid Jagmad Sampatund Ladiq Mesers Sid Jagmad Sampatund Ladiq Mesers Sid Jagmad Sampatund Ladiq Mesers Sid Jagmad Sampatund Color Mesers Sid Jagmad Sampatund Mesers Self Raghunghoux Mill promises Mesers Son Mesers Mill promises Sid Sansarmid Mesenghia Mesers	1" 138 " 812	17 139 * 134	42%		9 411	
7 Mail 8 Mo 9 Samuel 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	orijsh Sr Umaud Mills Ltd. Pult Marunt 1880 Textils Wills Ltd., Hidwars Dijay Cotton Mills Ltd. (former), Hijay xxini (Totti Mills Co.) Nest Ny Sittim 18870a.nr (Aumer)	Meser 11e blee krid in keen i 11 kente Oline on Mil premises Wester Silhagmal Sumpitimal Ladit, Mingong to 120 Ori en Mil pre- pares Silh Raghunathem. Unrenglike Mg. Director Office in Mil premises Still Sanarmal Unranglike Mg.	* 812	* 171		420		1 210
9 Sin I I I I I I I I I I I I I I I I I I I	Bijay Cotton Mills Ltd (formerly lipay exten (foth Mills Co.) Near Ry Stitch (paymagnet (Almer)	Mesers Schagmal Sampetend Lodle. Moragone Series Offer en Mill pro- purses. Seili Raghunathsina. Umsunghko- Mg. Director (Price in Mill premises. Seith Sonwarmal Umsunghko Mg.			450		11 343	1 309
1, Ber 2 R 4 3 5 m	usini Cloth Mills Co.) Near Ry Sittim	Seth Raghunsthoms, Minempha Mg Director Office in Mill premises Seth Sanwarmal Minempha Mg	11 500		\$ m)	226	' 113	' 17
i, Ber 2 R i	o Mthudeo Cotton Mills Ltd , Bhilwara	50th Sanwarmed Musunghka Me		7 11 1	12"	-04	2 512	t 12
2 R 8		Director 19th e on Mill premiers	4 240	2 5 12	45		LTI	219
2 R 8		Total	1 72 864	148 (12	3 673	2163	45.056	7,799
2 R 8	BERAR,							
3 511	ar Manufacturing Co , Ltd , Badnera	Messes Kasturchand Dadabbox & Co. Agents Hieu House Sir Harozslah	21 181	19 (63	161	32.	4 713	1 104
3 5%	5 Real chand Gopel las Mol eta Apg and Wag lills, I til (formerly Akola Cotton Mills, Ltd.)	Mehta Re al Fort Hombos Mesers, Bulakelus Moheta & Co., 11d., Mg Agents, Other on Volt premises	21 506	28 74 ,	460	441	C) h	1311
4 10	ikoli atrum Rampnusa i Mills Co, Lt i Tajmapeth, ikola	Movers Secultrain Sons Ltd., Agents. Akela	13 # 16	12 102	30*	211	4102	13,
	arblet Wills, Berar, Ltd., Elliel per, Ammeta justicet	Messes. Ded much & Co., Secretaries, Treasures and Agents Office on Mill promises	12 092	11 5 11	31-	31.1	3.257	801
		Tol 1	84.114	61 101	1 453	1 341	1× 76	1/16
	madhya pradesh.	•					_	-
1 Ber	igal Nacpur Cotton Villa, Ltd., Rajnandgaon	Merces Shaw Wallers & Co., Menaging	31 476	29 766	ros	F03	* 414	2 (12)
2 Bitt	hunpur Tapti Mill, Ltd., Burhanpur Lal Big	Agents 4, Bink-hall Street Calculate Mouses P Nichla & Sono Agenta Cooks Building, Roraly Road Fort.	23,512	27 *00	riti	3	6 M	1 432
3 Cin	tral India Sjimning, Weaving and Mig. Co., td. (I mpress Mills) Nugpite	Hombas Masse Tata In Instruct Isl., Mg Agents Bombas House, 21 Hence Street Fort	1 17 184	91476	2 104	20-3	21 123	n 9.29
4 No	let Wills Nagpur I to Umrer Hoad, Nagrur	Bombay Mosers Bansilal Alarch in I Dailal Loy & Co. Acrate Baco II we Sir I hiroschali	12 105	47 514	9 1	976	11 × 1	2 h
	gion Cotton Mills Ltd. (formerly Palgaon action Spinning Westing and Manufacturing o. Ltd.) Pulkton Diet Wardha.	White Road, Fort, Burden Messes Hardayal Sons Mg Agents, 53 Apollo Street, Fort Bombay	13 724	14 090	213	211	2 401	1.31
6. Rai	Baladur Banul d Abrehan I Spinning and earing Ville Haiganghat, Diet Wardin.	Shrumati Sodradevi N. Doga and Otlers Owners Office on Mill promises	31 eu	29 631	311	372	4121	1 050
7 Ray	Saleb Pekchan I Mohota Spinning and eaving Mills, Ltd., Hinganghat, Det Wardla	Selli Mathuradas Mohote Mg Dun tor Himanghat,	21 672	29 674	112	3 ()	3 50"	1 426
		T×al	2 97 544	2 rd 324	1351	3 147	1 748 6	7 073
	BIHAR							
ı Bih	_	Henry Kushmath & Co., 1+1 Mg Agents	7 632	6 13*	1 9	152	1.41*	425
	ar Cotton Valls, Itl, Plmlwars Sharsf, Palme	Mesors Kashmath & Co., 14.1 Mg Agents P O Hauleury Start Latins Mr. F. Prasod Blandari Minaging Director, Other on Yell premiers	क्षा भवा	12 139	, 	312	1 677	992
	ar Cotton Mills, Itl., Pludwari Sharif, Pelnu ra Cotton and Juto Mills, Ltd., Geyn		27 532	15 278	715	497	3,122	14.0

	NAMES OF MILLS	AAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES	Total Number of spindles installed	Average sumber of %; sodies at work dall;	Anmber of Looms Installed	Average Number of Looms at work daily	Approxi tiate quantity of Cotton consumed during the year in chours of 784 Ins	Average Number of Han is employed duly
	HYDERABAD (NIZAM'S TERRITORY),	-						
i	Surangaled Mills, Ltd., Aurengal ad	Messrs Gupta Sons, Ltd., Mg Ments, Empire House, Hornbs Road, Fort,	16 744	13,911	271	- 194	2,744	1,265
2	Azani Jahi Mills, Ltd Werrangel , ,	Bombay The Industrial Trust Fund, HEH tle Namu's Covernment, Agents, 159, Gun	19 944	19,817	432	420	9 403	1,312
3	Dewan Bahadur Ramgopal Villa, Ltd., Fleinguida, Sreunderabad, Decean	Ltd., Agents, Post Box No. 5, Secunder	16 376	15,420	303	341	3 - 13	477
4	Hydershad (Doccan) Spg and Wag Co., Ltd., Elchiguida, Scoundersbui (Doccan)	rabad (Deccan) Vesit Ramanna Bhoomish and Venlate brishmal, Agonts, Post Rox Vo 1", Secunderal ad (Deccan)	13 040	11 389	241	182	J 369	819
ń	Mahaboob Shala Kulharga Mills Co., Ltd., Galbarga	Messes Dayaram Surapual Lahots, Agents, Begumpet (Deccan)	27,764	27,704	1.00	:07	, 840	1 672
6	Osmanshalu Mills, I td., Nanded	The Industrial Trust Fund, H.E.H. He Agam's Government Agents 159 Gun foundry Ros I, Hyd rabad (Decem)	23 150	24 225	t+2)	607	0.816	1,630
		Total	I 19 292	1,10 663	2,472	2 200	32 * 18	7,72)
	CENTRAL INDIA							
1	Bhopel Textues Ltd , Bhopel ,	Rampur) Ltd., Offen on Mill premises	13 (4)4	18 877	100	3%1	1.414	924
2	Pined Mills Co., 1til (Bmod Mills), Ujjaun Gwellor	Messes Binodiram Bakhami Ltd. Secre- taries, Treasurère sud Azents, Office on Will premises	3 • 300	34.303	877	818	}	2 019
3	Bined Mills Co., Ltd. (Despitant Mills formetly hipm Cotton Mill), Gwalior	Mesers Binodiram Balchand Ltd., Secretaries, Trensurers and Agents, Office on Mill primises	17,084	16,393	480	461	10 616	834
4,	Hirs Mills, I id., Upnin	Sir Sarupehand Hilkameland & Co, Agents, Sitalinata Bazar, Indore	26 732	13 324	864	780	8 567	1,427
5,	Hukamchand Mills Ltd., Indore	Mesers Sarupchanil Hukamchand & Co, Secretaries, Treasurers and Agents, Office on Mill premises	44 348	42 490	1,449	1,422	1 3,443	3,531
6	Indore Maiwa United Mills, Itd., (Old Mills)	Messes Gorindram Sekserin (Indore), Mg Agents, 139, Medons Street, Fort,	}					
7.	Indore Malwa United Mills, Ltd., (New Mills) Indore Citi	Bombas Nosars Covindrum Schoatrs (Indore), Mg Agents 139, Vedows Street, Fort, Bombas	33,602	49,728	1,420	1,205	18 127	3,395
9	Jivajcerae Cotton Mills Ltd., Gwalier, (Near Morar Head Matten)	Morane Buch Brow. (Challor) Ltd.	43,880	43,069	1,408	1,376	20,826	2,475
9	Kalyanmal Mills, Ltd., Indon	Variaging Vents, Office on Vill premises Wester Tillockchand Kalyanmal & Co- beerstaties, Treasurers and Agents,	36 412	35,983	980	060	10,734	2,705
10	R v Nazarah Mills (with Becciver), Kijatpura, Ujjain		16,949	16 000	379	\$60	3,200	720
11	Mothal Agerwal Mills, Ltd , Gweltor, (Near Morar Hould Railway Station)	L Bansidar Binsal, Esq., Vg Director,	13,300	10,121			2,783	334
12	Namibil Blianders Mills, 1 td , Indore	Office on Mill premises Mesers Nandial Bhandari and Sons Socretaries, Treasurers and Agents, Office on Mill premises Mesers Nandial Bhandari & Sons Agents,	94,00x	27,162	771	7 (1)	12,387	1,737
13	Rat Balandar Kanharyalal Blandart Mills, Ltd (formerly the Maharajah Mill), Malgodown Road, Indore	Mesers Nandlal Blandari & Sons Agents, Office on Will premises	12 694	14,789	331	334	3,960	912
14	Bujkum er Mills, I tol., Silnath Comp Hoad, Indore	See Sampeland Hukamelan I & Co,	19 728	19,453	701	640	6,150	1,657
15	Shree Sapin Mills Ltd (formerly Rutlam Bombay Pinted Spg and Wag Co., 1td.) Ratlam	Mesers Copuldas Fuladhar & Co., Ital., Agents Office on Mill prepares	15 831	15,515	440	418	5,144	1,207
	Shri Maharani Mahaf-ahai Cottini Mills Co., I til . Downs Junior	Station Rossi, Bathan	10,244	9,400	. "	:	1,430	312
17	Swadoshi Cotton and Floir Mills [61, Schiath Camp, Indore City	Mesore Jagannath Naravan & Co., Manug- ing Agenta, Office on Mill premises	- 89 - 5 6 - 95	14,223)،	23	7,047	1,033
•		Total .	K.	3,83,746		1	1,32,678	25,320
	WEST BENCAL.	1			t			
	trats Cotton Mills I td , Dawanger, Howards	Mesons Ones Bree Mg Agents, 29, Straid Ross i, Calcutta, 20, Ltd., Mesons Shah Clm Co, Ltd.,		1,853			39	119 - 4
	Banga Sr. Cetton Mills, Ltd., Sod-pore (24, Parganas)	Agents, 23, Hart ullick St.		931		,	1,614	· 1
	Bangrawan Cotton Mills Ltd., Scrampore, Hoogis	Or Agreedone sanaging Director, 63, Red tie			4		1,256	
4.	Rangodaya Cott or Mills 1 td., Pambati, District 24 Perganas.	Mesors Rampt 1 td hatt,					-	ł

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_	NAMES OF MILIS	\AMES OF ACESTS OR OWNERS A\D OFFICE ADDRESSES	Total Number of Spin flee installed	Average Number of Pulsedies St work daily	Number of Looms Installed	Average Sumber of Lounes al bronk tally	inste quantity of Lotten consumed during the Year in candles of "at the.	Average Number of Hands emple yed daily
•	Basanti Cotton Mills, Ltd., Birrackpore Trunk Road, Pamiliati 24 Parganas	Ug Agents 24 Netaji Subhas Road Calcutta	12764	12,394	3*6	352	I 602	768
6	Bengol Belting Works, Ltd Bosepura Lane Serampore	Mesers S & Roy & Co Lt ! Mg Agents 2 Dalhouse Square East Calcutta Mesers The Bengal Textile Agency,	1 950	1 640	102	43	362	274
7	Bengal Luxum Cotton Mills, Ltd Mahesh Serm pore, Dut Hooghly		3,916	34,907	936	90 t	3 521	1 691
8	Bowreah Cotton Vills Co Ltd Bowreah Dist Howrah	Messrs Lettlewell Bullen & Co., Ltd. Mr. Agents 21 Strand Bond, Calcutta	47.572	4* 872	83+	835	1816	2,135
B	Dunbar Mills Itd. to 1 Stammagne (District 24 Parganas)]						
	Dunber Mills Ltd., No 2, Shannagar (District 24 Parganas)	Mesors Lettlew II Bullen & Co Ltd	42 944	41 274	518	518	ff 529	: 113
11	Dunbar Mills, Ltl. No 3 Shamnagar (District 24 Parganas)	Agents, 91 Strand Road Calcutta						
	Dunbar Mills Ltd., No 4, Shammagar (District 24 Pargunas) East India Cotton Mills Ltd., Maurigram Howrith	J						
13	District	bendra Mohin Kundu Chowdhury, Mg Directors 120 Maharshi Debendra Road PO Hatkola Calculta,			96	24		100
	Hindustan Cotton Mills, Ltd Belgurriah '4 Parganas	Dt 4 C Sen Gupta Mg Duretor Calcutta National Bank Buildings P 2 Musion Row Extension, Calcutta.			120	96		82
15 16	Hooghly Cotton Mills Serampore Kesoram Cotton Mills, Ltd (formerly Allied Cotton and Dye Works Ltd.) 42, Garden Reach	Mr A W Sen Proprietor Scrampore Messes Birla Bros. Ltd. Agents S Royal Exchange Place, Calcutta	57 900	49,270	1 990	3 8-4	17,123	4 031
17.	Road, Calcutta Mahalaxun Cotton Mills, Ltd., Pelta 24 Parganas	Mesons H Datta & Sons, Ltd., Mg Agents 1> Clive Street, Calcutta	a 789	7 391	169	166	1 0*9	347
18	Manindra Milis Ltd., Cossimbazar, Murshidaliad West Bengal	Veisre Choudhery Roy & Co., Ltd 23 Hurro Chunder Vullick Street Calcutta			144	133		300
	Mohani Milis, Ltd (Mill No 2) Belghurral 24 Parganas	Mesers. Chakravart: Sons & Co. Managing	17 3-0	15 693	334	331	3,244	814
20	Rampooria Cotton Mills Ltd (formerly Shra Narsing Cotton Mill) Serampore, Mohesh	Agents 22 Canning Street Calcutta Mesors Hazarimuli Heerald, Mg Agents 148 Cotton Street, Calcutta	23 196	2,218	70.	84 1	4,310	1 403
	E I R, Bengal Shree Hamman Cotton Mills Co (formerly New Ring Will Co. Ltd.), Fulcehwar P O Ulubera Dist Howrah	Mesera Partabmul Rameshwar & Nursing & Co Ownera 46, Strand Road Cal utta	21 19%	23 333			3 730	7711
22	Shree Radha Krishna Cotton Mills Ltd., Mill No. I (formerly Goosery Cotton Mills) (in liquidation)	Agents 122, Chuserv Road, Howrsh.	23 232					
23	Shree Radha Krashna Cotton Mills, Ltd. Mill to 2 (formerly Jajodia Cotton Mills Ltd.), 17> Couch Chech Road, Relux, Howenh Dast	Mesers, Sadlusean Tularam Managing Agents 1°2 Chusery Road Hourah	15 732	lo out	364	\$32	1,796	993
24	Shra Hadhevram Mills, Ltd (formert) Buarat Abhyuday Cotton Mills, Ltd) 220, Naskarpara Road Chuzury, Howard	13) Canning Street Calcutta	40,364	31 312	410	103	8 102	1 669
25	buidheswari Cotton Mills, Anantapur Howrsh	Mewrs. Manna Mondal and Millick Co. Owners Office on Mill premises.			11*	79		92
20	Sci Durca Cotton Spg and Weg Mills, Ltd., Leaninger (E I Ry)	Mesers Choudhury & Co. Ltd. Agents 23 Harrochunder Wallack Street Calcutta	4,229	5 110	220	210	1,3*0	432
27 28	Swadeshi Industries Ltd., Panihatti Victoria Cotton Mills Ghoosery, Salkia 1 O	Messes Anandram Gajadar Mg Agents 100, Velaji Subash Road Calcutta Messes Pariabmuli Rameshwar & Nurang	1° 304	11.950	131	129	1.241	320
	Howreh District	& Co Proprietors, 46 Strand Road Calcutta			156	138		
29	Vidyasagar Cotton Mills Ltd Sodep ir Dist 24 Parganas	Agents, 11, Calcotola Street Calcutta			130	13%		223
		Total	2 93 904	3 33 031	900	8,210	59 812	21633
	EAST PUNIAB							
	Dayalbagh Spg and Weg Mills (formerly Benkateswar Cotton Mill, Ltd.) Putligari, G T Roa i Amritsar	or Sahal ji Maharaj Vills I t t Proprietors, Office on Hill premises	12 14*	4,54)	2.02	83	e3r	2-0
	Punjab Cloth Mills Ltd Bhiwam (Dist Reser)	Mr Radhakrishen Porumal Managung Director Blawani	- 908	7,572	225	221	2 497	2×9
3	both Spirming Lt I (formetly Amritsar Spg Midls) G T Road Amritsar Technological Institute of Textiles (formerls	Verses, Chomial with & Bros. Lt! Vi. Agents Office on Mill premises. Birla Education Trust Agents, Pilson	4 544	1 188	39	30	224	804 64
4	Technological Institute of Textiles (formerly Bhiwam Cloth Mills, Ltd.) Bhiwam	(Jappur)	12 160	19 140		271	4 .03	51/2
		Tetal	37 164	26 4 ,6	824	610	7 %. 2	1 *25
	DETHI BEOAINCE							
1		Mesers Bris Bros. Ltl Agents, S Royal Exchange Place Cal-nits	32 923	29 651	960	797	11,254	1,790

	NAMEN OF SHILLS	NAMES OF YESTLE OF OR VICTOR VALUE	Total lumi er of Spindu s installed	Average Sumber of Spindles at work daily	Number of Loons installed	Average Number of Looms at work daily	All h XI mitto duxutity of Cotton consulted diring til year in caudi a of vii lbs	Average Number of Handa employed daily
	HYDERABAD (NIZAM'S TERRITORY).							
ı		Mesers Gupla Sons Ltd., Mg Agents Empere House, Horaby Road, Fort,	16, 149	13,011	27.1	_ 194	2 744	1,265
2	Aram Jahi Mills, I tol. Warrangal	Bombay The Industrial Trust Fund, HE II the Nizam's Government, Agents 179, Gun	14 944	19 813	432	426	b tus	1,82
3	Dowan Bahadur Remgapal Mills Ltd., Flehigudda, Sceunderabad, Deccan	foundry Road Hyderabad (Dicean) Mesers I achimitarayan Rumgopal & Sons Litt, Agents, Post Box No. 5, Secunde rabad (Decesia)	16,374	15 420	103	293	3 (2	477
4	Hyderabad (Decean) app and Wag Co., Itd Elrhiguid's becunderabad (Decean)	News Pamenne Bhoomah and Verkata Krishnah, Agents, Post Box Vo. 1 Seemilerahad (Decean)	13,656	9 569	241	182	1 414	814
5	Mahiibooli bliaki Kulburga Vidis Co., Ltd.,	Measure Dayaram raymal Lahoti, tgent- Begumpet (Decem)	27,764	27,704	1 (40)	507	840	1 672
6	Gulliargi Osmushala Mills, I td., Nanded	The Industrial Trust Fund II L If the Azem's Government Agents, 130, Oun- foundry Ros I, II of usbui (Decean)	21 550	34 220	611	(()*	9.840	1 610
		Total	t 19 294	1 10 763	2 472	2 200	32.5%	7,721
	CENTRAL INDIA							
- 1	Bliq al Textiles Ltd., Bhopal	Mesers Sir J P Ministers & Sons (Rampur) I til , Oil on on Vill pressises	15 004	13 871	100	186	C 4 H	924
2	Band Mills (a. Ltd. (Banol Mills) Upom townfor	Messes Binodirom Balchand Ltd. Secre lares Treasurers and Agents, Office on Will premises	}3 300	E199)	857	918	11 646	1019
4	Burot Ville Co. Ltd. (Deep hand Ville formerly by ra Cotton Vill.) Gwalior	Mesors Binochram Bak hand Lt 1 Secretaries, Treasurers and Agents, Office on Mall premises		16,39 i	480	46I		879
4	Hira Milla Ltd. Lynni	Sir Sarapchand Hukemehand & Co Agents, Sitalmeta Bazar, Indore	26,732	23,524	864	780	N JBT	1 421
1		Meters berupeliand Hukemeliand & Co Serretaries Treasurers utul Agenta, Office on Mill premises		42 490	1,448	1 422	10 443	8 535
ń	Inders Malwa United Mills Ltd., (Old Mills) Inders City	Mesers Conmitteen Scheens (Indore), Mg Agents, 139 Medous Street, Fort, Rombas		49,728	1,420	1,205	16,127	3 395
7	Indore City Indore City	Meses Govandrom Scharus (Indor.), Mg Agents, 139, Vedova Strest, Fort, Bomba)	: [
	Juapuran Cotton Mills Ltil, Guahor, (Near Morar Road Station) Nolyanutal Mills, 1 td., Indore	Managung Agents, Office on Mill premuses	17,880	43,0119	1,408	1,37ь	20,626	2,475
10		Mesers Tillockchund Kalvanmal & Co., Secretat es Tressurers and Agents, Office on Mill premises Khan Salieb Seth Alabakhdaji Mumiradda		35 985		960	10,734	2,703
11	Ujjun	Driverses Troprietor, Office on Mill		18 000	370	360	3 200	726
12	Roul Railway Status) Sanill I Blandari Mills, 1 td , Indore	L Bursidar Binsal, Feq. Mg Director, Office on Mill premises Mesors Annillal Bhandari and Sons,	13,300	10,131			2,783	334
••	- I make the second of the sec			27,162	171	714	12 387	1,737
13	Bu Bulindur Kanburyalal Bhandan Mills, Ltd. (firmerly the Maharajah Mill), Malgoriowa Road, Infore	Office on Mill premises Mesers Nandial Bhan fare & Sons Agents, Office on Mill premises	15,694	12,798	121	336	3 960	012
11	Rujkumur Mills, Ltd., Silnath Cump Road. In lore	Agents Office on Milt premiers	19,724	19,471	701	640	6,150	1,657
15	Sleev Sajita Mills, Ital (formed) Kutlam Bombay United Sp. and Wag (b. 114) Ratlam	Agents, Office on Mill premises		15,515	410	418	5,144	1,207
16	Devisa Junior	Metion Road, Rathin	10,241	9,400	•		1,430	312
17	Swadeshi Cotton and Flair Mills 14th Silmstii Camp, Imdore City	Mesors Jagannath Naray in & Co. Moning ing Agents, Office on Will premises	14 784	14,225	362	353	7,047	1,033
	WEST BERGAL	Total	4,07,706	3 83,746	10,949	10 276	1,32,678	25,320
- 1	Vrata Cotton Mills 1 til , Dassangs r, Howeth	News Day Bros Mg Agents 20, Strand	2,743	• 1,953	140	48	59	119
•	. Bangu bri Cotton Mills, Ltd., Sod pore (24. Pargenna)	Ros I, Lakutte Mesers Shah Chaudhury & Lo., 1td. Agents, 23, Harro Chunder Mullick St. Calcutts	10,728	9 931	276	276	1,614	491
	Bangrewari Cotton Mills Ltd., Serampore, Hoogly Bangodiya Cutton Mills Ltd., Pamlati, Distrat,	Dr Narenbranath Law, Managuni Director, 63 Radbal aver Calcusts		9 073	300	290	1,2~6	494
_	24 Paryanes.	(24 Pargunas)		_ ••	310	320	***	544

	NAMES OF MILLS.	TAMES OF AGENTS OR OWNERS AND OFFICE ADDRESSES	Total umber of writing histailed	amber of spindles at work daily	Yumber of Looms installed,	Average Violer of Louis at work dolly	Ap; form mate grantity of Cotta a communed during the year in tanking of "st fbe	Average Number of Hands employed dally.
7	Basanti Cotton Mills Ltd., Barrackpore Trunk Road, Panihati, 24 Parganas	Mesor, The Calcutta Agencies, 1td., Ng Agents, 24, Netan Subbas Road, Calcutta	12 664	12,394	316	352	1,603	769
6	Bengal Belung Works, Ltd., Bosepura Lane Serampore	Mesers S K Roy & Co Ltd., Mg Agents, 2 Dalhouse bquare Fast, Calcutta	1,040	1 680	102	43	362	274
7.	Bengal Luxmi Cotton Mills, Ltd. Mahosh Seram pore, Dest Hooghly	Measure The Bengal Textile Agency.	3 + 916	34 507	936	904	3,524	1,691
8.	Bowresh Cotton Mills Co Ltd Bowresh, Diet Howah	dgents 11, Cleve Rou, Calcutta. Vesses. Kettkwell Bullen & Co., Ltd.,	428~2	42 572	835	835	5 516	2,13 >
9	Dunbar Mills, 1.td , No 1, Shamnagar (District	Mg Ageuts, 21 Strand Pond, Celcutta						-,
10	21 Parganas) Dunbar Mills, Ltd., No. 2, Shamnagar (District	į						
11.	Dunbar Mills, Ltd., No. 3 Shamnagar (District	Mesers Lettlewell Bullen & Co Ltd. Agents 21 Strand Road Calcutts	42,914	41,274	518	518	8,520	2,115
12.	Danbar Mills, Ltd., No. 4, Shannagar (District							
13	24 Parganas) East India Cotton Mills Ltd , Maurigram, Howish District	Mr S P Chakravarit and Mr Mana bendra Mohan Kundu Chowdhurs, Mg			96	59		100
	Hindustan Cotton Mills, Ltd., Belgurrih 24 Parganas	Calcutta Vational Bank Buildings, P 2 Vission Row Extension, Calcutta			120	56		82
15 10	Hooghly Cotton Mills, Scrempore Kesoram Cotton Mills Ltd (formerly Allied Cotton and Dye Works, Ltd.), 42; Garden Heach Road, Calcutts		ı7 900	44 2-0	1 000	1 674	17,123	4 ñ31
17.	Mahalaxmi Cotton Mills, Ltd., Felta, 24 Parganas	Mesors H Datta & Sons Ltd	5,789	5,391	169	166	1,079	347
18.	Manindra Mills Ltd., Commbazer Murchidabed West Bengal	Mg Agenta 15, Cine Street Calcutta. Neser Choudbury Roy & Co., Ltd 23 Hurro Chander Mullick Street, Calcutta			144	133		300
	Mohini Mills, Ltd (Mill No 2), Belghurrush, 24 Parganus	Managery Clarkers or Sons & Co Managery	17,340	15 893	331	931	3,215	844
20	Rampooria Cotton Mills Ltd (former), Shri Narsing Cotton Mill), Scrampore, Mohesh E I R; Bengul	14%, Cotton Street, Calcutta	23 146	22 319	795	#49	4 340	1 403
21	Shree Hamman Cotton Mills Co (formerly New Ring Mill Co, Ltd.), Fuleshwar, P.O. Ulubena Dist Howrah Shree Radha Krishna Cotton Mills, Ltd., Mill No. 1	Mesers Partahmul Rameshwar & Nursing & Co., Owners, 46, Strand Road, Cal utta	24 196	21 313			3 790	770
	(formerly Goosery Cotton Mills) (in liquidation) 122, Ol i Ghusery Road, Howrah Shree Radha Krishna Cotton Mills, Ltd., Mill No. 2	Mesers Sadhurum Tuharam, Managing Agenta, 122, Glimery Road, Howrah, Mesers, Sadhurum Tularam, Managing	23 233	15 5.0	564	532	1,706	910
	(formerly Jajodia Cotton Bills, Ltd.), 17a,	Agents 122, Glusery Road Howrsh		10 40.7	504	032	1,100	21.163
	Shre Radhenam Mills, Ltd (tormorly Bharat Abbyuday Cotton Mills, Ltd.) 220, haskarpara Rosd, Ghusury, Hownsh.	Messes, Sovarum Keshavdeo, Mg. Agenta 133, Canning Street, Calcutta	47 366	31,312	415	4113	8,102	[(0)
25,	Suddhesware Cotton Mills, Anantaput, Howrah	Newes, Manna Mondal and Mullick Co., Owners, Office on Mill premises			112	79		92
20	Sri Durga Cotton Spg and Weg Vills, Lif., Konnagar (I' I Ry)	Mesers Choudhury & Co., Ltd., Agents 23. Hurrich under Mullick Street, Calcutta	€ 2.14	5,110	2.00	216	1,370	432
27	Swadeshi Industries Ltd , Panihatti	Mesors, Anandrum Gajadar, Mg Agents 100, Netaji Sutsash Road Calcutta			151	L ₂ q		320
	Victoria Cotton Mills, Choosers, Salkis P 0 Howrah District	Mesors Partabmuli Rameshwar & Nursing & Co Proprietors 46 Strand Rossi Calcutts	12,394	11 040			1,241	365
29	Vidyasagar Cotton Mills Ltd. Sodeput, Dist 24 Parganas	Mesors United Commercial Agency, Ltd., Agents, 11, Cabotola Street, Calcutta			156	134		223
		Total	3 93 063	3 33,031	9 070	83 n	59 812	21673
	EAST PUNJAB							
1	Davalbagh Spg and Wag Mills (formerly Benkateswar Cotton Mill, Ltd.) Puthgarh, G T Boad, Amritan	ur Sahabji Maharaj Mills I tit Proprietors, Office on Mill premises.	12 144	4 540	223	85	636	270
2	Punjab Cloth Mills, Ltd., Bhuwam (Det Hassar)	Mr Radhakrishen Puranmal Managang Director Bhiwami	7 903	7,342	225	221	2,457	553
3	Seth Spirming Ltd (formerly Amritsar Spg Mills). G. T. Road, Amritsar	Me Accuse Office on Mill pressure	4 515	1 158	39	30	224	44
4	Technological Institute of Textiles (formerly Bhiwam Cloth Mills, Ltd.) Bhiwam	Birl's Education Trust, Agents, Pilans (Insport)	15 169	13,146	204	-71	4,507	802
		Total	39 854	26 416	874	610	7 832	1 *25
		_						
1	DELHI PROVINCE. Birla Cotton Spinning and Weaving Mills Ltd (formerly Hamman and Mahadeo 8 and W. Mills), Subminund, Delhi	Mesers, Birla Bros Ltd., Agents, 8 Royal Fachinge Place, Calvitta	32 023	29 431	960	797	11,254	1,790

_							Apprexi	
	VAMES OF MILLS	NAMES OF AGENTS OR OWNERS AND OFFICE APPRESSES	Total Tumber of Spindies tastalled	ti rrage under of 4 indica at work da ts	umber of Lorms installed	Average Number of Looms at work daily	of Lotton	Aversa Vallet of the last I the last I
0 T	cliu Cloth and General Mills to 1t1 Vill to J.	Sir Shankar Lall Mg Director Bara"	1					
	Rolitak Road Delbi	Sir Shankar Lall Mg Director Bara Hindu Rao P B N 39 Dell i Sir Shankar Lall Mg Director Bara						
	Robtak Road Dethi	Hm lu Rao P B No 39 Delhi	7:194	T3 079	1,874	1,817	32,490	4 2 -1
	Pell's Cloth and General Wills Co., Ltd. Will No 3 Rohtak Romi. Delhi	Huidii Rao, P B No 33 Delhi				-10	8 124	1.8
2 8	watentra Blarst Ville, Vajuljarh Rowl Delle	The Della Cloth and General Valls Co. Ltd. (Delha) Owners	72.080	17 737	128	218	8 124	, ,
6 (cenks Catton Spinning and Westing Mills Co. Lif, Mahahir Catton Spinning Co., Ltd.,	Mesors Parstam Harmondras Mana, mp. Agents Klatra Tolocco Khari Biol			307	307		
7 3	Grand Trunk Road Delha. akhma Chand Ja pura. M.E. (Mahab r Cotton. Souning and We rang Co. Lt.) Leasehold es)	Dalle	14 712	6 82 1	224	130	124 (433
	Subarmundi Dell'i					3 259	53 3	7.01
		Tı tal	1 47 604	1 27 042	38,0	3 250	03 3	7.07
	UTTAR PRADESH		-					
1		Messrs Atherton West I Co Lt I Owners Post Bix No 6" Kanpur	34 300	39 300	514	800	× 311	1 "02
2 1	knares Cotton and bilk Wills 1sd. Chowkealb t	Vesors 'tal Prasad Kharag Pro 11	13 1112	19 37"	1.0	1915	441	1 124
3 1	Tejpal Mills Itl) Sa ni Gate Mendu Road	Veers Stal Present Kharag Fro VI Vig Agents Office on Vall premises Messes S K 111 Vi. Agents Freegunj Agent	12 "80	11 481	-10	11	>(1)	080
4 1	Hail ras City awapore Cotton Wills Co. (C.C.V.). Coopergon;	The British Lidix Corporation Laid Owners Post Box to 3 Lampur	4 1 29%	44 1/9	871	864	1	(2 509
5 6	Kanpur arr pore Cotton Milis (a (Julu) Juli Kanpur		26 3 .1	26 ()61			19 Gtel	6.0
	Cawapore Textiles Lt1 Co pergang Kampur	Owners Post Box to 3 Kanpur Mesers Begg but erland & to 1td Mg Agenia Sutherland House Kenpur	13 936	23 742	510	209	7991	845
	Devallough Textule Mills Ltil Davelluigh Agra	Mg Agenta Sutherland Rouse Kenpur Mesers Soemi Security and Service Corp.			73	10		30
		110n Ltd A ents Dysalbagh					21 278	2 646
	Figur Wills Co. Itd Civil Lones Kamp in	Mesers Bigg Sitherland & Co. 1 td. Mg. Agents Sutherland House Kanput	12 1 0.2	49 327	1,199	1 159		
ď	indra Spy and Wag Villa (formerly Ages Ma- and Wraving Villa Co Ltd.) Jeoni ka M n h	beth S wanel on I Owner Office on Mill premises	13 9 4	19 108			1,401	329
10 11 12	Agra John's Mills Co (formerly John's Commation Spg Juli) Jeon & Min h. Agra John's Muls Co (formerly John's Linkers of Wislo- by naming Mill) Jeon & Maril, Agra John's Mills Co (formerly John's Spg Mill) Jeon's Mandi Agra	John Merrans Owners 46 Cantt Agra Mr J L John Mr M L John & Mrs D	002 Ec	27 909			\$ 609	1,700
13	J. A. Cotton Manufacturers Ltd., Darchanpura hamlapat Roel hamfur	John Merrins Outhers 46 Citti, Agra- Mestri J. A. Commercial Corpn. Ltd., Managing Agents Lambs Tower Lamiter	21 400	20,167	40	24	0,850	70.
14	Juggilel Ramlap it Cotton by g and Weg Wille Co Itd, hawstgam Julii Kampur	Sr Padsupat Sughams Mg Director Dwarks has Road Kamla Tower Kantur	44 964	43 220	ชนจ	024	7,030	1 884
15	Kansuj UP Wvg Mills Mol Istansli Kansuj UP	Vir L. Mandal Benunsdhave Owner, Office on Mill premises			98	20	_	75
16	Lakshmurttan Cotton Mills Co., Itd. Kalps Road Kanpor	Messra B R Sons Mg Agenta Behari Niwas Kampur	29 310	26,340	773	504	3 457	804
17	Lall's Mal Hardeo Date Cotton Spinning Mill Co Salal ad Gate Hathras City, Aligarh D strict		10 892	10 092			4 025	476
15	Mode 16 & Wag Wils Lt 1, Modulagar (Meerut)	Mill premises News R B Curjannal Modi & Bros.	29 000	18,000	390	30,	314	854
19	Moradabad by many and We sang Mills Co. 11d.	Mg Agents Offices on Mill premises Tals Harr Raj Swarup Mg D rector Kund mpur Mora lubad Mg T North Research Could have	13 79n	12 247			1,032	419
~20	Moradahid Mur Mila Co , Ltd , Kanpur	Mr T V Jaieri Director Civil Lines	94 114	84 602	1 500	1 520	22,162	2,877
21	Naram Cotton Mill Hans musuch Kampur	Nones H Bryss A Co Propoetors	14 656		189	- /		
22	New Vi toria Mills Co 1 td , Gwalton Kang in	Means J P Suvastavi A Sons 11d	66 0 > 2	62 106	1,367	1,352	17,729	3,056
23	Prem Spinning and Weaving Wills (> 1td	L Kailash Clandra Soni Sometim	17 600		1,507		1,933	613
25	Ujhani, District Bada m Ramehand bpg and Wag Mills (formerle New	Lihani	30.010	13,685	•	• •		668
23	Rainchand Cotton Mills) Hethras Cits, Algarh Dist Rara Textiles 1 td , Jwol na_ ir Rompar (Siste)	M irsan Cate Hattens City		1,309	171	120	4,099	
-		It 1 Mg Agents Rami ur (State)	21 644	18 764	440	415	6,187	1,231
21	Sacted to Cotton Mills Surfamili	Stee Dearkadeh Road Kanpur	3 110		• •	٠.	•	
27	Shri Rallin Arishna Mills (known as Mirzspin Coston Mills) Narghal Mirzspin) Viveksmand's Road Calentta.			T 4	49		211
24	Shri Vikram Cotton Wills 1 t1 (formally P G Cotton Wills Co. Ltd 1 Talk itors, Lucknow	Arents Luckness	17 51 (17 031	311	272	3 103	922
11	Sendeshi Cotton Mills Co. Ltd. Juhi Kanpur	Vescos, Japan's Brotters 1td General	1,14 836	1 13 312	1 946	1.886	24,823	3,742
•		Total	7 93 919	7,09 007	12,451	11 363	1 83,769	30 517

-	NAMES OF MITTS	/THES OF (EVIT (R OWYERS	Total Valuer of Spin ci h alled	Average imper of pindles at wo k daily	Number of Looms ins alled	Average lumber of Looms at wo k dally	A Wa ma que y o Cot n convum i durir ha yea in candles of i Da.	Average Ymper of Units em oyed da y
	MADRAS STATE.							
1	taron Spinning and Weaving Wills Ltd	Mr C m I Amon Mr Dre o Office	t= 000	61	3 7	3 *		10
2	Papp n seer North Wal bar Asher Textiles Ltl Avanash Road Trupp r		14 669	13 %			0 401	431
3	Blakrishna Mily 1td 47 Lat Mad ra Stat m Road Mad ra.	We breats, Vanasha Road Trapp or Wr 4 H > Ramasammy I er & So s 47 I t U I r S at or Road W I ra.			83	-5		73
4	Road Mad ra. B ckin, h m and Car a c Co Ltd (Bu kirglain Will) I cramber Madrias	Ve le nie beneuen Street Madera	1 *0 01*	1 13 744	*73			
5,	Buck na harm and Carrate C 1t1 (C nat Mill) Perambur Madres	loon a long as Co (Ma Iras) 111 Mg	!	1 13 741	-73	* 706	39 431	£ 59 1
6	Cambrida Mil. Ltl hinganallur Comi at re	Mesers Price Lev & Co It I Managing	3 6 4	9 0	4	3	10 0%	975
-	Cannanore Spg & W g Wil Lt1 hakk t	M sers. Mall r It I tral 5 m heate M tern. Office on Mill prem ser Mesers. In test In I t per 1 f khot a f	1" 000	10 65			3 531	961
8	Lauren 5rg & Wig Mills, Itil Co. rs No. r. P. O. Vellan r.	Mesers I need Ind a good I t khot a J 1t1 M inquity Age a OF se on M II premiers	11 / 16	14			617	16*
9	Combatore Cotton M.B. ItI > mualtr	Victors R Reet A 1 & Co	384	9			o 33	6 8
10	Comba ore Kunal Wills, Lt i Su-mail r		J 58	9.33			1 9	190
11	Confluence Murusan Mill 1td Mett pal n I sad Confluence	Agent Ofthe n VIII press see Moses, T. V. R. nellige in Chot ar & Co. Agent. Ofther O. VIII premises M. See T. R. Nersym assen in No. I. & Co.	19 46 1	1734			4 0	505
1*	Combetore Porser Ville, 1td Peclamer	Ages to Corrol tope	19 **)	15 * C			^,230	380
13	Combatore Spinning and Westing Co. Ltd.	Mosers R C S \all & C Serret rousd. Igents Box \o *i (o n intere. Mesers R C h \all & (o Serretar et d.	74 9	40 503	344	356	6 SO+	1 497
14	Combatore Spinning and Wesni to 1t1 Tad pull Bran b (former) Antira Cotton	Messa R C h \a 1 & (a \secretar red \kee to Box \ "4 Combutore			81	1		137
1.5	Combatore Spunning and Weyns, Co Itl Tad pall Bean be (formed Antica Cotton Mila) Tadepall Gotur Di Composural Mesum, Factory Caum ore	The Commoncalth Tr. t L 1 Cal ut			311	701		513
16	Malaber Dawood Mile Lt I Tre ha Road Puduko tau	Malabur Meses M Shaik D wood & Co Agen	3 61	4 0			8	50
17	Dhanal k lura Wills, Iti Uti kul Roci	Hest I or to 1 Pr 1 kkets Messer M. Vanjappa Chett ar, & was	*5 3 10	9 141	143	3.1	5 %	90
19	Tripur Crausal ka VIII Iti Veliku r Cemlatore	Many 3 (Sell non-Go who & How	11 ° >>	10.801			54	308
	Janak man Mille I i I bri di pu I r B sed Rej	Man ging Agents, Vellak nor 110 se Vell kmar Lost C mi atore Mesera 61 k l 111 Mg. Agent Office a						
30	palayam Janari na Will It! It! lyalayam buranull r		*1	47.3C)	0	20		94
*1	Jawalar Mill Ltl Schru Sagram Sale	Mesers C Venksta wam Vanti A Co Agenta, Office on M II permises Mesers I ma amb La & Co. Mg. 1gen	63	4 499			339	479
	Junet m. Jayuhilaim Mills Iti Upipalayam Sna	One on M II prem see	4 344	30 3			80	515
23	nallur Jayantlu Ram handrapps & t3 MM Ltf	Of re on Vall promises	****	300		4	8 11	113
**	Rayadrug Billary Dist Jayaram Mills Ltd Rajapela am Ramnad Dist	D rector Office on Will premies.	1.7		81	6 ₆		121
	Kalcesuarur Will Itd Aun perpalayam	Mesers A. J. A. R. Art nacl alun Ci ett ar	JO 304	46 94	м,	*9n	6 093	1301
	Completore	& Denan Bala lur P Somasundaran Che tast Sert Office on M II premises Mesers C & & Co Agents 8 Second Line						1 371
	Kanlu Textl= 1t1 Ti ravo tyrr Madras.	Ben 1 Ma Iras,			()	23		78
0	Kartl keyan Villa Iti V manalir Trinclel D∜roct	Mesers 1 R M Velayutha Mudal ar & Co Ltd. Mg. 1grats 4.3° Ma n. Road Ambasam dram	6 000	1 %			•	42
*8	Kasthuri Mills, It 1 an anall r Combatore	Many C X Ambatanathy As do & Co.	to 08	11 23			1 690	307
фq	Kotlan Text les It1 Suganall e Combatore	Lt1 Agent. Office on VIII prem sea. Messrs. Nothern & Sons, Mg Agents Oriental B Id ngs Armenion Street Madras.	138 4	13 439			182	*19
30	Kumaran Milis Ltd Puduppalayan Idigaras	Mesers. \ Appaswam \ast & Co	6 31"	81			9 6	138
31	Post Combatore Lakshm Mills Co., Ltd. Mill to 1 Paypanauken	Agents, Lo mbatore Mesers. (* h. pp iswami Na du & Co Office on M II premises.	41 401	41 714			7 913	500
3*	palayam Avanasi Poad Combitore Laksim Mils Co Ltd Voli No "Ko lpatty	Meson G Kuppuswan Nadu & Co Office on Mill repuss.	17 71	1. 918			» 14 Y	46.
33	Lotus Mill Ltd. S niarap man Palan e	Messa Poins Value attention of the	1 610	13 973			306	1.6
34	Loyal Textile Mills Lt I (formerly I oval Mills, Lt I) Ko ilputt	Messre So them Agene es Ltd Mg.	4 1,	3 4 1	9. 1	4	60 4	731
3,	Madras Sp., and W. L. Mills Co. Ltd. (forme by Madras Ln. ed Sp., and Weg Vill.) Madras	Ltd Secretaries & Igents Combatta Bulling 4 Queens Road Fort	40 161		7.4			
36	Malura Mills Co. L. I. Mad ra (Old an I New)	Bomb v Mesers A & F Harvey Ltd Managers,	2 30 50	~,24 t			43 98	331
	Madura Mills Co Ltd Tut orm (formerly Corst	Mesers 1 & F Harvey Lid Vanagers	60 13	59 539			19 aa	4 501
_	Mlls Co Itd) T t rorm	Madura						

_	NAMES OF MILLS	NAMES OF ACCUSANCE AND OFFICE ADDRESSES	Total Sumber of Spind a lasts lo i	titings mbar of spindl s at work daily	Jumber of Léoms ounder	Average Number of Looms at work daily	Approxi in te q antity of Cotton cons im d d iring i e yinfli can Hetif "Si lbs	Averag Vumber of H is e d yest
	Delli Ciota an I Ceneral Signs Co. 1 fd. 2004 to -	Sur Slankar Lall Mg Director Burn Halu Reo P B No 3) Dell L Na Shankar Lall Mg Director Barn Knika Pao P B No 32 Della Sur Slankar Lall Mg Director Burn Sur Slankar Lall Mg Director Burn	-,184	73 e e	1 82 1	1 8 7	32 490	4 2 1
4	Delhi Cott and General Mills Co , Lt 1 Mill No 3 Rolitak Roa I Delhi Swatantra Bharat Mills Najsigarh Ro i 1 Delli	H n 1 Rao P B No 39 Delhi The Delhi Cloth and Ceneral Mills Co Lt I (Delhi) Owners	25 (80	17 - 37	a28	218	8 124	-8
Б	Goenka Cotton Spu ning and Weaving Mills Co Ltd Mahalur Cotton Spinnon, Co Itd.	Messis Parsiam Hamanirai Min ging Agents Lhatra Tobacco Khan Biol Della	ì		307	207		
7	Cenn I Trunk Road Dell : Laki m; Chan I Japurra Villa (Valud r Cotton Spin ing and We iving Co. Ltd. I case holders) Shamund Dell ;	P Seth Ram Cowar Ja 11 rti Ot ne Office on Will premises	1171,	647)	*7(1	120	1 769	431
	, iorinam Pont	Total	14 104	1 27 092	3 8 34)	3 209	53 237	7 06
	UTTAR PRADESH		•					
1	Atlerton Mills Anwergen, Lapper	Messes Merton West & Co Ltd Outers Post Box No 6" Kanger	18 300	39 300	894	800	8 930	2011
2	B nares Cotton and Silk Mills 1 td Chox kaplat	Messes Stal Prasid Kharig Irasil	4111	11377	103	304	t 491	1 134-
3	Bull Cotton Mills Lt Hathras (f emerly Tuls a Temal Mills Lt Sa. et Cat Men Lt Ros)	Mg toents Offee of Mill premises Messes \ K 1t3 Mg tgents Freeging tgen	1 50	11 940	20	11	a 821	660
4	Had ras City Cave pore Cotton Mills (o (((M) (o perg m)	The British It 1 Cryptration Ltd Ouners Post Box No 3 Kang in	4 %	44 373	37_	998	l	\$ 5 100
5	Casupore Cotton Mill (o (I !) Jili Kanjur	The Petral Inch Corneration Lt.1.	76 717	30 uPI			10 601	80
6	Campere Text les Lt l Cosperging Isani r	Owners I ost Box No 3 Kanj ur We's Sergh Substiant & to I to Mg Agents Sutherland House Kanjan	13 936 r	23 742	210	.00	7 93 >	84"
7	Disalingh Text le Mill. Ltd. Davaling! Agra	Messa Noc il Se ritt i nd Servico Corpo tion Ltd. Acents Davidlanh			72	10		3
P		Vesser Begg Satterlin i & Co. 111 Mg			1 188	1 159	21 278	2 64
9	In its 5pg and Weg Mils (formerly Agra Six and Weaving Mils Co. Lt.). Jeon & Man is	Sthisgan Inn) Owner Office on VI	13910	13 109			1,401	32
10	\gf#	M. J. I. John Mr. W. I. John & Mrs. D.	ין					
11	John s Mills (o (formerly John s I r ness of Wal > Spinning Mill) deont k Man b Ages	John Merrat & Owners 48 Cantt Ages Mr J E John Mr M I John & Mrs E	1 5 350	27 9 30			8 600	1,7
12	John a Mila Co (formerly Jo) n a apg Mil) Jeona ka Mantia Agra	John Merzane Owners 46 Cantt Agra Mr J C John Mr M 1 John & Mrs E John Merzane Owners 46 Cintt Agra						•
13	Lordon Man in cturers Ly 1 Darra implies	Messes J & Commercial Corpn Ltd Managing Spents Kombi Tower Kunpur	-, 401	20 167	30	24	6 850	. د ء
	Jugadal Kaunlapat Cotton Sig and Weg Mills Co Itd Anwarganj Jula Kanpar	Dugrhedia Road Lamis Towe	r	43 %	909	924	7 930	1,
!	Kanaij Dyeing & Wig Mile Mol Pilenele Kunaij UP	Office on Mill permises			ამ	30		
11	Antipur	News B J Sons Mg Agents Belo				102	3 457	-40
1:	Sad tha I Gate Hatly ray City Mugch District	Mr Sleo Pershal C niroller Office of M Il premises					4 030	-
1		M premises Messes R R Cupitrud Modi v Bros Mg tgenrs Office on Will premises Lali Hari Raj Salaruj Mg Directo h mdunp ir Moradillad Mg T January	. 13 000 r 13 00		-	د داق	324 1 032	
	Morniabad	A milimpir Moradilad Mr T N Javers Director Civil Line	s 93128			1 520	22 162	
-2		Mesons II Beyes & Co Proprietor			150	1 340	22 102	, ,
4	•	Sul j mandi kanpi r				1 302	17 729	5~
2	3 Prem Spinning and Weaving 31114 () 111	Scoret 1919 P B No 41 Kinp ir L Kailash Chandra None Socretar	11 600		.,		1,930	
•	Ullum District Ballain					153	4 000	
2	5 Riza Text [w It] Judiany Rusp r (Sinte)	Ser J. P. Slemastava & S. 18 (Rampus 111 Mer. Scentis, Ramour (State)	3 31614	1878	440	41	6 18*	1.
-	8 Section Cetton VIII Sil uh	111 Me Acents Rampur (State) Mesers randes Cepallas Acent wee Distribution Roal Kamp r	a 3 440	,				-
1	T Shri Rollis Arishna Mills (known of Mirzapu Conton Mills) Narghat Mirzapur Shri Viknim C (ton Mills 11.1 (form dv R C	15 Anckonomia Road Calcutta	4		74	43		= ,
2		Rang 1 Small & Sons Itd Managu			3,1	272	3 101	
•	. I Sumbodis Cotton Mile Co. 11d. 1st; but pur	Mesons Juppers Brothers Ltd Ceners ging Kat pur	1,14 836	1 13 31	1 916	1 866	21 823	
		Total	7 93 010	7 09 00	J2 451	11 363	1 83 768	

_								
1	NAME OF VILLS	NUMES OF AGENTS OF OWARS	Total Sumber of Spin the Installed	Arriage Number of Spindle of Work dally	Number of Lemms installed	Average Number of Leoms at work dai)	Approxi- mate quantity of (cetton consumed during the year ites of f44 flar	Average Number of Hands erassoyed daily
73.	Vijyalakshmi Milla, Ltd. (formerly Vynyu Milla Ltd J. Kuninyamuthur, Combatore	Mesus Gupta & Co., Ltd., Agents, Post Box No. 11, Combatore	11,032	4,838			1 967	293
		Total	16 80,183	15,22,915	7 634	6,415	3 36,31%	31,487
	COCHIN & TRAVANCORE							
1. 2	A D Cotton Mills, Ltd , Quilon Alagappa Textiles (Cochin) Ltil (Alagappa	Mesars Girdharlal Amrathal & Co Mg Agents Office on Mill premises Mesars Ramal & Co, Ltd Managing	12,000	10 523	3111	2155	1,67%	140
3	Textiles), Alagappanagar (Cochin State) Alagappa Textiles (Cochin) Ltd (Cochin Textiles)	Agents Alagappunagar P O (Cochia State) Vesara Romal & Co. Ltd. Managang	14 300	±# 773			3,764	1,499
4	Alagappanagar (Cochin State) Alwaye Textiles, Ltd., Alwaye	Agents, Magappanagar P O (Cochin State) Messrs Shankar Agencies Ltd.	j 6704	Enos	119		120	IIs
		Mg Agents Alwaye			110		-	
δ	Cochin Mahalakshmi Cotton Mills Ltd. Mulakunnathukaya, Cochin State	Messrs Corbin Agencies & Industries Ltd Managing Office on Mill premises	1,504	1 300			200	87
6	Mulakunnathukavu, Cochan State Sitaram Spg and Wvg Mills, Ltd Trichiu, Cochin State	Vesses T R Anantharams Iver & Beos Ltd. Variaging Agents Pushpagui, Tradur	15,614	17,391	416	.347	3,472	789
7	Vijayamohim Mills Ltd., Thirumala Poojapura, Trivandrum		6,720	3,305		٠	346	202
	MYSORE.	Total	46,634	61,092	726	652	4,537	2,835
1	Bangalore Wooilen, Cotton and Silk Mills Co., Ltd., Agraram Road, Bangalore City	Mesers Binny & Co (Madras) I'dd Serne, Treas, & Agents, 7, Armenian Street, Madras	40 604	39,196	1,1,7	I 092	12,311	4,145
2	Davangere Cotton Mills, Ltd , Devangere	Mesers R Hanumanthappe & Son.	I6 12×	13,245			3,579	686
3	Minerva Mills, Ltd , Bangalore City .	Building, Chitaldrig Road, Davangere Hesses A Sour & Co., 11d., Mg. Agenta, Temple Bar Building, 70 Forbes Street, Fort, Bombay	34,016	33,172	476	473	9 212	1,712
4	Mysore Spinning and Manufacturing Co., Ltd., Venkatarangasengar Rd., Malleshwaram, Bangalore City	Messrs N Suur & Co., Ltd., Mg Agents, Temple Bar Building, 70 Forbes Street, Fort, Bombay	19 606	43,871	o00	484	10 692	2,315
8	Sri Krishnarajendre Mills, Ltd., Siddalingapur, Mysore	Mr II Sanjundia, Chainsan & Mg Director, Office on Mill premises	27,200	23,298	202	264	5,714	1 244
6	Sr. Krishna Weaving Mills, Subramanyapura, Kengeri Post, Uttanhalb	Mestra Yadalari Subhini Setty & Sons			174	168		461
7	Sri Shankara Toxtile Mills Ltd , Davangere	Froprictor, Chickpet, Bangalore City Mesers Mirrigharajendra Company, Post Box No 2, Davangero	6,600	6 60n			613	229
8	Shree Survedaya Mills (formerly Bangelore Spg and Weaving Mill), Yeshvanipur,	Messre Rama Settur and P. S Sullauppa Chettur, Proprietors, Office on Vall			73	50		142
0	Rangelore City T. B Mills, Chamare pet, Bangalore City	premises D. R. Madhava Krishnava, Owner, Office on Mill premises			208	163		155
		Total .	1,72,215	1,61,080	2,880	2,698	42,121	11,299
,	PONDICHERRY. Angle French Textile Co., Ltd. (Rodier Mill).	Montes Best & Co., Ltd . Managing Agents.	44,256	44 094	1,000	549	12,140	3,323
	Ponthcherry Establishment Textale De Modeltarpeth S A	Post Box No 63, Madras Blr S C. Ayyavoo, Managung Durector,	15,969	13,791	307	292	1,957	938
2.	(formerly The Pondicherry Cotton Mills, Ltd.),	Post Box No 10, Pondichetry						
3	"Savana" Societe Anonyme de Filature et Tissage Mecaruque, Savana (Inde-francaise), Pondicherry.	Mr. Marcel Valot, General Manager, Office on Mill premues	22,969	22 87%	671	672	6,207	1 792
		Total	83,193	078,08	1,980	1,613	19,394	6,053
		INDIAN BUMINION Total 1	05 33,799	93,55,267	97,807	81,848	21,82,719 4	,63,075
	PAKISTAN	-						
	SIND.							
1.	Daulatram Spg & Wug Mills (formerly Surl Textile Mills), New Jaul Country Club Road, Karschi	Jamnades Ibp Dutta Esq., Proprietor, Country Club Road, Karacht	2,216	2,216	60		762	151
	EAST BENCAL.							
2.	Acharya Prafulla Chandra Cotton Mills, Ltd., Boxes Many Road, Khuina	Messrs Bengal Workers' Association Ltd., Mg Agents, 3, Madan Street, Calcutta			110	47		129
3	Acharya Prafulla Chandra Cotton Mills, Ltd. Boyra Mann Road, Khuina Bagerhat Co operative Weaving Union Ltd. Bagerhat, E. Bengal.	Mesers Bengal Provincial Co-operative Bank Ltd., Mg Agents, 3 2, Dalhouse Square, East Calcutta.			30	35	· 	

	NAMES OF MILES	\131f9 of AGF\73 or off\ebs. A\D office \lambda \text{Theresis}	Total amber of 89 adies in as ed	Average Sumber of Spodies at work daily	Sumber of Lorens ins a led	Average comber of Looms at work dai;	trage quant ty of Lotton con u need d z the ye r a cand s of 7% bs	Average umber of Hands emp oyed daily
38	Ma I ra Milis Co Ltd Aml asamudram (formesh Tannevelly Milis Co Lt I) Ymbasam dram Madura Milis Co Lt I (Pandyan Mila Madura)	Messra 4 & F Harvey Ltd Managers Malura	1 40 736	t 31 693			34 674	4 949
39	Madura Mils Co Lt i (Pandyan Mils Madura)	Mesars A & F Harvey Ltd Blanagers	33 304	*8 701			8 071	108
40	Madura Fort Mal afak l mi Text le M lls Lt l Mad ira	Madura Meesrs S S A Lakelmanan Cleit ar & Co Ug Agents Paut nala I O	21 6 7	*1 627			5 66	784
41	Malabar Spinning and Weaver & Co. Ltl. Kall Val. lar	Mad ra Vesers A. L.A., R. Somanadi an Clett ar P. S. Sathappa Chett ar and A. K. T. K. M. Narayanan Namboodrapad Agents Kalla	20 9 1	19 958			q	47?
4*	Mettur In lustries Lt ! M tt r Da	Men re W A Boardsell & Co Ltd	24 0 0	24 752	503	603	6 367	846
43	Plant Viewer Mils Ltd Dhel Rad Idan al	Meson Bhagyalakahma & Co Mg	2 000	20,324			349	412
41	I nhaps Mile Lt i Pulak lam Countatore	Agenta Office on M II promises Mesors C & Ratnesabapathy Mudal ar & Sons Mg Agents & Secretar cs P O		95 689			107	743
40	P ll car Wills Ltd Tiru ! ngode balen Dat	No 150 Combatore Mezers V V C R V spuri Mudaliar & Sons Agenta Truchengodo	1 900	9 6%			1 430	195
40	Radi krasi a Wills Lt Pecisme Combatore	Messrs A G Gurt swams Va lu & Co Mg Agents Office on Mull premises Mr M \ P Kanagavet Owner Office	36 464	34 066			8 101	870
47	Raja M lla Madura	Mr M C P Kanagacel Owner Office	8 080	\$ 000			11.3	300
48	Rajalakshm Mils Lti Uppd palayan binga	on M li premues Mesars B Rangas ann Na da & Sons	°5 896	∿ 112			4 1	697
49	nallur P O Computore Papapalayam Mills Lt i Rajapalayum Ranna i	Managing Agent Office on Mill premises Rameo Agences Ltd Mg Agents	14 *00	13 467			4 717	503
50	S nkur Mills Chatram P dukulem Translvel Tunnevelly Dist	Ramamandram Rajapalayam 3 bankaranamar Pillas & Sons Propr e			101	94		8*
δl	Tinnevelly Dist Surgenallur Co mi atore	tors Office on Mill premoce Messes Thingaraja Cletty & Sons Ltd	1300	12 488			1 991	942
79	Si ree Cenkatesa Milis Ltd Ulsmalpet Combetore Dist	Messrs Thingaraja Cletty & Sona Ltd Managing Agents Office on Mill prepuses Messrs G V Covundaswam Ne du & Co Managing Agents 3 69 Pasupati Muda Las Street Udumalpet	38 660	3,839	448	6	3 846	637
83	Somas indersin Mil Ltd (formerly Co ml atore	Mr P S Sathapps Chettur Mg Agent	3 200	°1 031	390	807	2 498	1 100
54	Mail M IIs) 270 M II Road Coumb tore So lararaja M is Ltd Power House Pon I	Trichy Road Combatore Measrs Lakel mana & Co Mg Agents	9 600	8 763			1 091	908
5.5	Durd gul. Sree Meenakal Mill Lt Ti ri pparankun Iran Roa i Mad ra	Office on Mill premises Mesers Thiagaraja Chetty & Co Mg Agents Office on Mill premises	37 904	36 43°			13 003	1 302
66	Stee Raje utra M is Ltd (former) Salem Rajendra M ils Lt i Can il Nagar S le n	Agents Office on Mill premises Mesers Thiagaraja Chetty & Co Ltd. Agents Memakshi Mayam Tirup pur mkundram Bos I Madura	17 "00	14 507			3 507	450
67	R mno i District	Maser See Alagas Ltd Mg Agents	a 00	460			1 80	437
68	Stree Sury anarayana Sig an 1 % g Mills I ndala pika L Qoda ety D trict	Street Rajapalayam Ver Undavill Satjanarayanamurts Manag ng D rector Office on Mil	o 584	s 360			J74	*15
89		premises Meses h. Krishnaswam Naid & Bro Agents Office on M I premises	1 698	1 096			1 433	389
60	Combators St. Kollandram Mills (Wearing) Venkatepaty Tyengar birret R. nind Rood Mad ra Sri Kollandram Mills ("panning) Chintam in B blood Depot Foad Mad apani Wal bra Sr Islamal Ranganariar Mills Lid Peria ne kompleten P.O. ("presente Distriction")	Mesers S S Ramudu Iver & Bro Owners			84	8		91
61	Sri Kothan fram Mills ("puning) Chintem in	272 Rammad Road Madura Mesers S S Ramuda Lyer & Bro Paraned Road Madura	4 000	3 978			1 662	015
60	St Islamal Banganatlar Mills Ltd Perm no kenpulsyam PO Combatore District		\$ 600	3 540			1 126	141
83	bri Ramadian its bpg and Weg Mils Pandals p ka I God ery D triet	Mg Agents Office on M II premises Mesors D Subbiredd A Bhamaredd an I U Chell ima Proprietors Office on	~ 011	5 878			163	P64
84	br Ramalings Choodam! ka Mill Ltd Ltl kuh Road Tirupur	Mil pre mass Vesses S Kull Chett ar & Bron Mg Agents 60 10 Uttuk h Road Trupur	13 194	1 9 0			2 318	369
6.		Marine D S (Americanous La de & C na	3 472	as 390	87	73	430	712
66	Ser la M lls Ltd Loganathaj un m Podan r Combotore	Mg Agenta, Office on Mill premases Mes rs V S Sengotia sh & Bros Mg Agenta Bakthi V bas Jail Howl Combators	14 479	13 893	170	143	2 543	39°
	Sri Satyanarayana Spuin g Mill, Itajal mundry Goda ery District	Rao Sabeb Valillanea Banavia	04ء 5	1 000			237	1.3
69	Lis Widnes Le lampatt Pulukkota State	Madura Owners Manaparas Post	°1 600	90 330			3 971	o 9
	Thrunagal Mills Lt 1 Cul vattam Nortl Arest	Tr hy Veses Ti rumal & Co Ltd Agents Office on M II premises	1 40	8 626			1 6	278
-	Trim rt Mills Lt i Bod patt Lda oslpet Combatore District		11 6 0	11,281			10	269
71	Trichmopel Mills Ltl halfyd Manapparas Road Trilinopoly L Vasanta Mills, Lti Singanall r Combatore	Mesers Moolpee Rampee and Rens Ramose barst Trichmonds	16 660	15 831			916	200
7:	L Lawanta Mills, Lt'i Sunganall r Combatore	on Mill premiers. Mestra Moolyce Rampee as d Rons Rampee Agar Trachinopoly Mesers, R A. Shanmikhun Cletty & Bros. Managing Agenta an 1 Secretaries Off on on Mill pren pees.	*9 304	27 864	270	767	5 771	883 [§]

	NAME OF MILLS	AMES OF ACENTS OR OWNERS	Totat Number of Spindles in, all d	irr age in ber of mpt dies twork d ilv	Au ober of Looms I stal ed	Average Num et of toen 4 st work dal y	Ap roxi- ma e qu ntity of Cot on consqued duri a th year in ra id re of 744 lbs	Average number of 11 ads employed dally
73	Vijyelskishm Milis Ltl (formerly Vyaya Milis Ltl) Kuninyam tlur Combatore	Mossr« Oupta & to Ltd Agents, Post Box \o 11 (omt store	, 1103	984			I)67	293
		Total	16 80 199	15 - 915	- 631	6 415	3 36 348	al 487
	COCHIN & TRAVANCORE							
	A D Cotton M lls Ltd Quilon Alagappa Text les (Cochin) Ltd (Magappa	Mesers Gridharlal Ameriti I & Co Mg Agenta Office on Mill premises Mesers Ra nal & Co I t I Menaging	ะา	10 20	3 41	**	I 635	410
3	Textues) Uagappangar (Cocl in State Alagappa Textues (Cochin) Ltd (Co l in Textues) Alagappanagar (Cocl in State)	Agents Magappanager I O (Cocius State) Messrs Ramai & to Jtl Manugung	4431)	e 3			3 764	1 199
4	Alwaye Textules Ltd thwaye	Agents Megsppanagar P t) tochr Statej Messrs bhankar Men es Itl	.)	114			10)	118
٨		Mg Agents Al aye	1)				*00	
6	Cochin Mahalakshmi Cotton Mills Lt I Mulakunnathukawu Cochin State 5 tsram Spg and Weg Mills Ltd Trichur Cochin State	Messra Coel n Agenc es & In Inst nes I td Managing Office on M II prem es Messra T R An Harsma I et & Bros Ltd Managini, Agents I sel pag ri	1 614	1 351	413	34*	34 2	87 789
*	Vijayamohini Milla Litd - Tl rumal'i Poojapura Trivandrun	Tral r Messrs Business & Co Mg No to Office on Mill prem was		a 31 a			316	202
	MYSORE	lotal	86 63R	61.09	726	6 2	9 37	2 835
1	Bangalore Woolien Cotton and S lk Mills Co 1 td Agraram Road Bangalore City	Verers B m v & Co (Madras) Ltd Seers Tress & Agents 7 Armen ar Street	40 605	39 10 3	1 15	10)	12911	4 140
٠	Divangere Cotton Mills Ltd Devangere	Mesers R Hammanthappa & Son Managing Agents Hammanthappa	16 178	t3 º I			3 573	1 66
3	M nerva Mills Ltd Bangalore City	Building Chitaldr g Road Davangere Vesses N S r ir & Co Lt l Vig Agents Temple Bar B ld ng "0 Forbes Sireet	34 010	33 170	476	473	0 _1	1 712
4	Mysore bp ming and Manufacturing Co. Ltd. Venkataranga engar. Pd. Malleshwaram. Bangalore City.	Fort Bombay Messra A S rur & Co Ltd Mg Agents Temple Bar B uiding *0 Forbes Street Fort Bombay	19 NJ	4 471	ورد	494	10 63	2 345
a	Sri Kr st narsjendra Wills Ltd. Siddslingspur Mysore	Fort Bombay Mr H Nanjund a Chairman & Mg Durector Office on M II premises Vaccinet Vaddam & Subal Petrose	a2 a80	3 * 16	*9	° 14	"14	1 244
6	bri Krisima Weaving Mil. Subremanyap ira Kengeri Post Uttanhalli	Freprietor Chekpes Bungalore City	6 600	45 HO	174	168	613	461
7	Sr. Si sakara Tertijo Milis Ltd Davangere Shree Survodava Milis (formerly Bangalore	Messrs Murugharaj ndra Company Post Box No 2 Davangree Messrs Rama Settar and P 5 Sathappa Chettar Propretors Office on Mil	1 600	0 511	73	50	619	112
	Spg and Neaving Mill) Yeshyantpur Bangalore City	Chettiar Propretors Office on Will premises D. B. Madhava Krishnana Owner	1		608	16.1		355
J	T R Mills Clamarajpet Bangalore City	Offi a on Mill premises						
	PONDICHERRY	Total	17,248	16108)	2 850	2 690	49 [2]	11 299
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2	Patablishment Textile Do Modelisrpeth S A (formerly The I and elerry Cotton Mills Ltd.)	Mr & C Ayyavoo Managing Director Post Box No 10 Posidicherry	15 969	13 701	30	292	1 937	ASS
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COTTON MILLS IN COURSE OF ERECTION (1949)

	AMES OF MILES	AMPS OF ACENTS OR OWNERS AND OFFICE ADDRESSE	Total Sumber of Spindles assailed	A ergen Trumber of Spind es at nork day	Number 100ms Ins siled	Average Number of Looms as work days	mate quanty of Lotton consumed darin t o year in cand a of 734 lbs	dai y
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1	h matak Bi agyod ya Mig Co Ltd B galkot	Mr M A Pat 1 Ng Agent 10 0	10 000		2 000			
2	S rat T zt b M its Lt i Varaci ha Road Surat	North Kasha Sholep r City Mesers Kanchanist Kaparita & Co Ltd	19 000					
3	Zs ercia Text Mile Li Vascut Engineer ng tompo nd Coyagate Barods	Mg Agenta Office on M II prem see Mesors Balkr shna Balmukund & Co Sorretaries Treasurers and Agenta Office on M I premises	19 000		300			
	MADHYA PRADESH.	•						
1	N rmada Cotton Mills Lt ! D st of J bbulpore	Messre Madt oprasud Manzohandas Vgents, Allahaba i	19 000		300			
	ORISSA.							
1	Orness Text a Wils Lt * V akpatan P O Dist Cuttack	Meses B Latnack & Co Ltd Mg Agents Office on M II premises	44 000		43 '			
	WEST BENGAL							
	Bay of Rangal Textiles 1td Joyrampore Dot Nation	Meters A Rashid & Co Mg Agents	10 000		200			
2	Bengal Fine by naing and Weaving Mills Ltd. honnegar (t. 1 Rh.)	Mewrs B (Anwn & Bros Ltd Mg Agente, Mercant le Bidgs Lalbarar	13 700					
3	Bengal Text le M lis Lt I	Cale ita Messa D \ Ciot Bury & Co Lt I Mg Agents *3 Horroct un l'r Mullick St Calcutts	17 000		5 000			
4	It you Cotton Mile It !	Messer, Burnstangka & Sous Ltd. Mg Agents, 6 Old Lost Office birect Calcutta	~0 000					
5	Dhalesware Textiles Ltd Near Assusol West Bengal	Mesers G K Ghosl & Co (Textues) Lt I	13 000		100			
13	D N Clouds my Cotton M ils Ltd.	Co ri House Cotner Cales tta Mesen Cloudium In I stres Ltd Secre innes and Agents "3 Horrochunder Moli k Arest P O Ha blobs Cale tta	8 000		1.0			

_	NAMES OF MILES	AND OLIVE THE OF ALES	Total tempor of Spin ti + installed	Average Number of Si indica at work dally	Sumber of Looms tunialled	Aversin Verniter of Looms at work, daily	mits quantity of Cetlon consumed it trius, the year in out it sof
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3	Murugananda Milis I til. Pettin Tumo o fly Town	Mr. G. Satratmania Pilla, Mr. Breeter Gill n I alice West Cur Street from t yeli Tewn (S. Indus)	12 000		Let		
\$	Premier Mills (C. B. f.) Ltd., Pulmkmar Village Udunales t Taluk Combatore	Mesers & Narayan isuamy Nachi A () Mr. Agents Perin aliva h Dhalls Loss					
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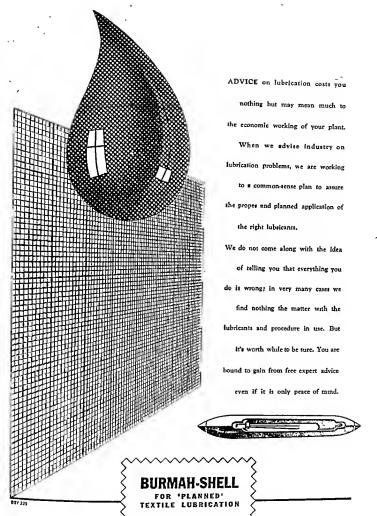
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